

Letters from the Corner Office, 2025

Katie Robbert, CEO



Foreword and Introduction

Hi friends!

Can I be honest with you for a second?

This year, I watched a lot of people get really scared. Scared about AI taking their jobs. Scared about falling behind. Scared about not understanding technology that seemed to be moving faster than anyone could follow. And as someone whose literal job is to help people make sense of data and technology, I felt that weight.

But here's what 2025 also showed me: the organizations thriving right now aren't the ones with the fanciest AI implementations. They're the ones that never lost sight of the humans involved. The teams. The customers. The actual problems worth solving.

Yes, generative AI attracted over \$33 billion in investment this year. Yes, 78% of organizations are now using AI, up from 55% last year. Yes, coding became a \$4 billion AI category seemingly overnight. But behind every stat is a person trying to figure out what it means for them on Monday morning.

That's what these letters are about.

One thing I firmly believe in is creating content that keeps on giving. When we pour our hearts and souls into creating something meaningful, it should continue delivering value in new and unexpected ways. This collection represents a year of trying to cut through the noise and offer something actually useful. These letters were originally shared through our INBOX INSIGHTS newsletter, and now they've found a home here—ready whenever you need them.

I want to take a moment to express my deepest gratitude to you. Whether you're an INBOX INSIGHTS subscriber, an active voice in our Analytics for Marketers community, or one of our trusted clients—thank you. For your questions, your feedback, and for reminding me that at the center of all this technology talk, there are real people doing real work.

Here's to a 2026 where we keep putting humans first, even as the technology keeps racing ahead.

Katie Robbert, CEO Trust Insights, Inc.

December 2025

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- [Almost Timeless: 48 Foundation Principles of Generative AI](#): A non-technical AI book by cofounder and Chief Data Scientist Christopher Penn, Almost Timeless teaches you how to think about AI and apply it to your organization.

Done With You services from Trust Insights:

- [AI-Ready Strategist](#): Ideal for CMOs and C-Suite leaders, the AI-Ready Strategist teaches you frameworks and methods for developing, deploying, and managing AI at any scale, from the smallest NGO to the largest enterprises with an emphasis on people, process, and governance.
- [Generative AI Use Cases for Marketers course](#): Learn the 7 major use case categories for generative AI in marketing with 21 different hands-on exercises, all data and prompts provided.
- [Mastering Prompt Engineering for Marketing course](#): Learn the foundation skills you need to succeed with generative AI including 3 major prompt frameworks, advanced prompting techniques, and how to choose different kinds of prompts based on the task and tool

Done For You services from Trust Insights:

- [Customized consulting](#): If you love the promise of analytics, data science, and AI but don't love the huge amount of work that goes into fulfilling that promise, from data governance to agentic AI deployment, let us do it for you. We've got more

than a decade of real-world AI implementation (AI existed long before ChatGPT) built on your foundational data so you can reap the benefits of AI while your competitors are still figuring out how to prompt.

- [Keynote talks and workshops](#): Bring Trust Insights to your event! We offer customized keynotes and workshops for conferences, company retreats, executive leadership meetings, annual meetings, and roundtables. Every full-fee talk is customized to your event, industry, or company, and you get the talk recording and materials (transcripts, prompts, data) for your audience to work with and learn from.

January 08, 2025: Rooted: to Establish Deeply and Firmly

I know a lot of people have New Year's traditions. We at Trust Insights are not excluded from that. As Michael Scott said, "I'm not superstitious, but I am a little stitious."

Every year, I choose one word, one theme that will guide us throughout the year. It's an anchor to bring us back to where we want to be and keep us moving in the right direction.

It is by no means an original idea; I won't pretend that it is. What I can say is that it's an exercise that has worked well for us over the past few years. It gives us something to look to when we need to redirect.

In 2024, our word was "Focus." I chose that word because I knew it would be the hardest thing for us to do. When we started the company in 2017, we were trying to be everything to everyone. We were reaching deep into our collective catalogs of skill sets just to bring in clients. Since that time, we've grown more confident in the work we do and have been able to narrow things down. We've also been able to partner with other agencies for the work that we don't offer.

When generative AI hit the mainstream market, I had a deep sense of dread. Not for what the technology would do to the industry, but for what it would do to us as a company. We like to experiment, tinker, and innovate. Doing this means you have to shed the guardrails and be a bit more free in your thinking. Creativity and experimentation, while important, don't always pay the bills. We had to find a balance between work and play. I am happy to say that because our guiding theme was "focus," I believe we did just that. We found focused time to test and play in the sandbox, as well as time to put our heads down and get the real work done. We focused on being focused. The experiments had a purpose. The sandbox became pre-production. We managed to balance work and play.

Moving into 2025, our theme is "Rooted." We've only just scratched the surface of how generative AI will shake the industry and the work that we do. To weather the storm that will inevitably come, we need to stay rooted. Rooted in who we are and rooted in what we do best.

The basic definition of the word "root" is to establish deeply and firmly. When I think about how that applies to Trust Insights, it means to rely on the basics. To refine and perfect them. To use them as the springboard for introducing new ideas and tech. Shiny objects like Local AI sound new and daunting, but at the end of the day, are just more software. If you have a handle on the software development lifecycle (SDLC), integrating Local AI shouldn't be problematic.

I won't pretend to know what this year will bring or how we will stay rooted. What I do know

is that we'll have this theme to fall back on when things feel uncertain. And they will. If 2024 was a rollercoaster, then 2025 will be a full-speed tilt-a-whirl. We'll get through it together. And we'll stay rooted.

What is your driving theme for 2025? Reach out and tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

January 15, 2025: Four Considerations for Local AI Models

I've been thinking a lot about the future of AI implementation in businesses. After spending the last few years helping companies navigate their AI transformations, I've noticed a significant shift in how organizations are thinking about their AI infrastructure.

Imagine you're building your dream house. You could rent everything—the furniture, the appliances, even the artwork on the walls. That's kind of like using cloud-based AI models. It's convenient, sure, but you're constantly paying rent, and you don't have control over when things might change or disappear. Now imagine owning everything instead. That's what local AI models offer: more control, potentially lower long-term costs, and the ability to customize everything to your exact needs.

Through my work with various organizations - from scrappy startups to Fortune 500 companies - I've identified four crucial reasons why local AI models deserve serious consideration. This isn't just theoretical; these insights come from real-world implementations, complete with their successes and (let's be honest) their face-palm moments.

If you want to hear more about local AI models, tune in to the [In-Ear Insights podcast](#).

Before we dive in, though, let's be clear: this isn't about jumping on the latest tech bandwagon. It's about making strategic decisions that align with your business needs, regulatory requirements, and long-term goals. I've seen too many companies rush into AI implementations without considering all the angles. Trust me, cleaning up those messes isn't fun for anyone.

Data Privacy: The Non-Negotiable Factor

Not long ago, a client accidentally sent PII (Personally Identifiable Information) to a public API. Talk about a heart-stopping moment! Thankfully, we caught it quickly, but it reinforced why data privacy isn't just a checkbox - it's a fundamental requirement for any business.

With local AI models, your sensitive data stays exactly where it belongs: within your infrastructure. No more wondering if your proprietary information is being used to train someone else's models. Honestly, the terms of current service agreements can be pretty vague.

Sustainability: The Hidden Environmental Impact

If one of your 2025 goals is sustainability, consider building a local AI model. Local AI

models can significantly reduce your carbon footprint by:

- Minimizing data transfer energy costs
- Optimizing processing for your specific needs
- Reducing redundant computations
- Allowing for more efficient hardware utilization

Costs: The Numbers Don't Lie

Many companies are looking for ways to reduce costs in 2025. While local AI models require upfront investment, they often make more financial sense in the long run.

Consider these cost factors:

- No per-token charges
- Predictable infrastructure costs
- Reduced data transfer fees
- Better optimization for your specific use cases

Business Continuity: Because Downtime Isn't an Option

[Remember that global IT outage last July?](#) Yeah, that wasn't fun for anyone. Running local AI models gives you control over your destiny (or at least your uptime).

Benefits include:

- Independence from third-party service availability
- Faster response times
- Better integration with existing systems
- Custom failover and redundancy options

All that said, local AI models aren't for everyone. You need the right infrastructure, team, and use cases to make them work. But if you're dealing with sensitive data, high computation needs, or strict regulatory requirements, it's worth exploring.

I'd love to hear your thoughts on this. Have you had any experiences (good or bad) with local AI models? Drop a comment below or reach out – I'm always eager to learn from others in the trenches!

Pro tip: Start small with a pilot project. Test a non-critical model locally and gather real-world data before making bigger moves. Trust me, your future self will thank you for this approach!

Are you considering using local models for AI? Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

January 22, 2025: Best Practices for Building Trust

Given the ups and downs of this week, this year, this decade, I figured it would be a good time to revisit trust building. Chris reminded me that I've written or spoken about this topic a lot. Despite that, trust is part of your foundation. Since this year is all about roots and foundation building for Trust Insight, I figured I'd revisit trust building.

So, in the interest of (sort of) not reinventing the wheel, we used NotebookLM to grab the greatest hits.

If you want to learn how to do this for yourself, [check out our livestream on January 30th](#) where we'll cover the basics of NotebookLM.

Looking back on three years of content, here are some tips for building trust with your teams and your customers.

Building trust with teams:

- Trust is the belief that someone will do what they say they will do. It is shown by consistent follow-through and communication. It is broken when someone fails to do what they have committed to.
- Trust is not all-or-nothing but exists on a spectrum.
- To delegate effectively, leaders must build trust by developing and documenting processes. This includes setting clear expectations and providing the tools for success.
- Building trust requires patience, allowing team members to learn and make mistakes. Consistent work from both sides, with constructive feedback, is essential.
- Trust starts with the leader defining the process and communicating expectations, not with the team.
- Team members need to trust that they have been given all the information they need to be successful.

Building trust with customers: - Trust is built over time through consistent interactions and by demonstrating that you will follow through on what you say. - Focus on building relationships and understanding customer needs instead of going straight for the hard sell. - Provide value by offering educational content that helps customers understand their problems. - Do not skip the relationship-building phase. - Actively listen to what customers are saying and help them put the pieces together for themselves. - Trust can be built by being transparent with prospects about how you work. - Be authentic to your brand.

Building trust in communities: - To build trust in a community, be aware of givers (valuable members) and takers (those who seek drama). - When trying to re-energize a community after a scandal or crisis, be aware of those who show up just for the drama. - Pay attention to members who perpetuate issues. - Behave in a way that is consistent with your brand persona. - Recognize the value of human connection. - Create a safe space where team

members can say “I don’t know.” - Rebuilding trust takes time, and people need to process situations at their own pace.

Other ideas related to building trust: - Do not use “I’m sorry to bother you” as a way to start a conversation; instead, ask if it’s a good time. - Strong governance and process development are essential for building trust. - Building trust is an imperfect process and requires giving people a chance. - You cannot outsource building relationships and trust to a machine. - When you have to try harder to have good communication, it is important to build trust with one another. - When using AI, be skeptical and questioning.

Building trust is not a one-time event. It is an ongoing process that requires consistent effort, patience, and clear communication. Like anything, it takes work, patience, and time. Keep at it. Building trust is one of the most essential parts of your foundation.

How are you building trust? Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

January 29, 2025: Why Your AI Implementation Will Fail Unless You Prioritize People

"We need to implement AI now—our competitors are leaving us behind."

That's what a client told me last week. But when I dug deeper, I heard a different story from his team. They were overwhelmed, worried about their jobs, and frustrated by constant technology changes that seemed to create more problems than they solved.

The real challenge wasn't the technology; it was the human element that everyone was afraid to talk about.

This scenario is playing out across industries - from healthcare organizations where patient care teams are wary of automation, to B2B SaaS companies where marketing teams are questioning their future role. The pressure to adopt AI is immense, but the human cost of doing it wrong is even greater.

The Hidden Costs of Ignoring Your People

For enterprise organizations, the impact of a poorly managed implementation goes far beyond wasted technology investment:

- Increased stress and burnout as teams try to adapt
- Lost institutional knowledge as key people leave
- Damaged trust between leadership and staff
- Resistance to future innovation
- Cultural rifts between "tech-savvy" and "traditional" team members

More concerning? These failures often create lasting cultural damage that can take years to repair.

Building a Foundation That Puts People First

Through years of helping organizations navigate technology transformation, I've learned one crucial truth: successful change starts with understanding and supporting your people. That's why we developed the 5P Framework, with people at its core:

Purpose

Before discussing any new technology, start with:

- Why are we really doing this?
- How will it help our teams do better work?
- What problems are we trying to solve for our people?

This clarity helps teams see opportunity instead of threat.

People

This isn't just about skills - it's about understanding and addressing very real human concerns:

- What are people actually afraid of?
- How can we protect and enhance people's roles?
- Where do we need to provide extra support?
- How can we turn skeptics into champions?

Remember: Fear of change is natural. Your job is to make it feel manageable.

Process

Document processes with the people who actually do the work:

- What unofficial workflows exist?
- Where do people struggle most?
- What tribal knowledge needs capturing?
- How can we make people's jobs easier?

This collaboration builds trust and surfaces critical insights.

Platform

Technology decisions must consider human factors:

- How intuitive are the tools?
- What training support is available?
- How will this affect daily work?
- Where might people get stuck?

Performance

Measure what matters to people:

- How has work-life improved?
- Where are teams struggling?
- What unexpected challenges arise?
- What support is needed?

Real World Success: Leading with Empathy

Recently, we worked with a marketing team to implement AI for content creation. Instead of focusing on just the technology, we:

1. Started with listening sessions (Purpose) - understanding the team's fears and

- hopes.
2. Created safety plans (People) - documenting how roles would evolve, not disappear.
 3. Let teams shape new processes (Process) – giving them control over their future work.
 4. Chose tools collaboratively (Platform) - ensuring solutions felt helpful, not threatening.
 5. Measured human impact (Performance) - tracking both efficiency and satisfaction.
- Result? Not only did they achieve their implementation goals, but team satisfaction increased and they should meet their staff retention goals.

Leading Change in Your Organization

If you're planning to implement AI, start here:

1. Listen before acting:
 - What are your teams really worried about?
 - Where do they need the most support?
 - What would make their jobs better?
5. Create psychological safety:
 - Be transparent about changes
 - Acknowledge fears openly
 - Show commitment to people's growth
9. Build confidence through quick wins:
 - Start with pain points teams want solved
 - Celebrate early successes
 - Let teams drive some decisions
13. Support ongoing adaptation:
 - Provide more training than you think needed
 - Create multiple feedback channels
 - Address concerns quickly

Remember: Technology changes are really about people changes. Organizations that recognize this don't just implement successfully—they build stronger, more resilient teams in the process.

The most powerful question you can ask isn't "What technology do we need?" but rather "How can we help our people thrive through this change?"

Your team is watching. Will you lead with empathy and intention, or just hope for the best?

How are you putting people first? How are you building trust? Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

February 05, 2025: Finding Clarity When Everything Feels Overwhelming

I've been waking up with a sense of dread every day for a few weeks. I know I'm not alone. A lot of us are struggling to find purpose and put one foot in front of the other.

I've written about finding your way through hard times before. But right now, as we're all trying to balance well-being with business growth, it feels like the right time to revisit how we can use structure to find clarity. I've said it before and I'll say it again. New tech doesn't solve old problems. And being human is the oldest problem of them all. It feels like a good time to remind you (and me) what we can do when everything feels like wading through molasses.

Finding Clarity When Everything Feels Overwhelming

[42.5 million Americans have an anxiety disorder](#). The data shows something important: we're not alone in feeling stretched thin. Americans are experiencing more mentally unhealthy days than ever before, and our businesses are feeling the impact. As a leader, I've learned that the key to moving forward isn't pretending everything is fine—it's being honest with yourself and your team. That's what makes you strong. Not trying to do it all alone.

If you want to find some control, some structure, try the 5P Framework to help you make sense of the chaos. (Yes, I can feel your eyes rolling from here. But hear me out).

The Power of the 5Ps

When everything feels like too much, I return to the 5Ps framework. Not just because I like frameworks (though I do), but because it helps me see the whole picture while breaking things down into manageable pieces:

1. Purpose:

Start with your "why." Yesterday, I caught myself spinning on tasks until I stopped and asked: "What actually matters right now?" Sometimes your purpose is as simple as keeping the lights on. Sometimes it's about growth. But you need to know which it is.

2. People:

Look at who's involved - your team, your clients, your stakeholders. I had a breakthrough moment last week when I realized I was trying to solve a problem without talking to the people most affected by it. Your people hold crucial insights about what's working and what isn't.

3. Process:

This is your "how." When I'm overwhelmed, I start documenting everything. Not because I love documentation (I do), but because writing things down helps me see where we're

making things harder than they need to be. Plus, documented processes make it easier to ask for help.

4. Platform:

These are your tools and data. Are they helping or hindering? Last month, we realized we were collecting data we never used while missing crucial information. Your platforms should make your life easier, not create more work.

5. Performance:

This is where you measure what matters. But here's the key—measure what actually matters right now. In tough times, maintaining stability might be a win. In growth phases, you might need different metrics.

Putting It All Together

Here's how this plays out in practice. When I felt overwhelmed this morning, I:

1. Checked our purpose: Are we still aligned with what matters most?
2. Connected with my people: What do they need to succeed right now?
3. Reviewed our processes: Where are we creating unnecessary work?
4. Assessed our platforms: Are we getting the right data?
5. Looked at performance: Are we measuring what truly matters?

The result? I found clarity about what needed my attention today (and what didn't).

Making It Work For You

Start small. Pick one area where you're feeling stuck and run it through the 5Ps:

- What's the real purpose behind this work?
- Who needs to be involved?
- What process would make this easier?
- Do you have the right tools and data?
- How will you know if it's working?

Remember: The goal isn't perfection. It's about finding enough clarity to take the next step forward.

Your Next Step

Look at your biggest challenge right now. Which P feels most out of alignment? Start there. Maybe you've lost sight of your purpose. Maybe your processes are creating more problems than they solve. Or maybe you're measuring the wrong things.

I'd love to know— which P resonates most with where you're struggling right now? Understanding this helps us all learn and grow together.

Because at the end of the day, that's what gets me out of bed (even on the tough mornings)
- knowing that by sharing our challenges and solutions, we all get better at navigating
whatever comes next.

How are you focusing and moving forward? Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

February 12, 2025: Why You Need a Skills Matrix Immediately

Here's what's happening in companies right now, and I bet this sounds familiar: Teams are staring at their project plans, realizing that about 40% of what they did last year is either automated or completely transformed by AI. The specialized technical skills they hired for? Many are now handled by tools. The capabilities they thought would matter most? Rapidly shifting. And the new skills they suddenly need? Those weren't even on the radar eighteen months ago.

I'm seeing this pattern everywhere. CTOs are discovering their data teams need entirely different capabilities. Marketing leaders are scrambling to understand what skills actually matter in an AI-augmented workspace. And HR teams? They're trying to figure out how to hire for roles that seem to change every quarter.

The speed of this transformation is, frankly, overwhelming. But here's the thing – the biggest risk isn't AI disrupting your workflows. It's not knowing what capabilities your team actually has right now to handle that disruption.

What Exactly Is a Skills Matrix?

Let's simplify this, since it's really straightforward. A skills matrix is essentially a visual snapshot of your team's capabilities. Think of it as a spreadsheet where:

- The rows list each team member's name
- The columns show different skills relevant to your business
- The intersection points indicate proficiency levels (usually on a scale of 1-5 or Novice to Expert)

For example, in our marketing team's matrix, we track things like:

- Data Analysis
- Content Creation
- AI Tool Proficiency
- Project Management
- Client Communication
- Technical SEO

Each team member gets rated on these skills, which gives us a clear picture of our collective strengths and gaps. I learned the hard way that letting people self-rate works better than trying to rate everyone myself. The key is to provide specific examples of what each proficiency level looks like.

Why a Skills Matrix Matters Now More Than Ever

Remember when we could plan team development on a yearly basis? Those were simpler

times. Now, the skills your team needs are shifting faster than ever, and without a clear picture of your current capabilities, you're essentially navigating in the dark.

A skills matrix isn't just another business document to create and forget about. It's your strategic radar for:

1. Identifying critical gaps before they become problems
2. Understanding where AI can actually help (versus where you need human expertise)
3. Making smarter hiring and training decisions
4. Ensuring your team stays relevant and valuable

Creating Your Skills Matrix

Here's how I approach this with our team.

Start with your current state:

- List all the skills currently needed for your team's success
- Create clear definitions for each proficiency level
- Have team members self-assess their proficiency levels
- Note which skills are becoming more or less important with AI adoption

Then, look forward:

- What new skills are emerging in your industry?
- Which current skills need upgrading?
- Where can AI augment existing capabilities?

Pro Tip: Setting Up Your First Matrix

Here's a practical way to start (this is exactly how we did it):

Step 1. Create a simple spreadsheet Step 2. List team members down the left side Step 3. Add skill categories across the top Step 4. Define proficiency levels:

- 1 = Awareness (understands the basics)
- 2 = Basic Application
- 3 = Competent
- 4 = Advanced
- 5 = Expert/Can Teach Others

Include a notes column for additional context or certification details. (This has saved me countless times during resource planning conversations.)

The Real Value (Beyond the Obvious)

The true power of a skills matrix isn't just in the document itself. It's in the conversations it sparks and the clarity it provides. When we implemented ours, we discovered that:

- Some team members had valuable skills we weren't fully utilizing
- Areas where we thought we needed to hire could actually be addressed through internal training
- Certain AI tools could fill gaps we hadn't considered before

Making It Work for Your Team

Start small. Really. You don't need to map every conceivable skill in your first iteration. Focus on:

1. Core skills that drive current business value
2. Emerging skills needed for upcoming projects
3. Areas where AI is creating the biggest impact in your industry

Remember to revisit and update your matrix quarterly. (I literally put it in my calendar because we all know how easy it is to push these things off.)

The Bottom Line

You can't manage what you can't measure, and you can't prepare for the future if you don't understand your present. A skills matrix gives you both the insight and the foresight you need to keep your team competitive and confident in an AI-transformed landscape.

What's your next step? Block an hour this week to start your skills inventory. Begin with just 5-10 core skills for your team. Trust me, your future self will thank you.

I'd be remiss if I didn't mention that this exercise only works if your skills matrix is aligned with your business goals. If your business goals and roadmap are not clearly defined, start there. Otherwise, you're guessing at what you'll need from your team. If you need a starting point, I'd recommend the [Trust Insights 5P Framework](#).

We'll be building a skills matrix on this week's livestream. [Join us at 1 p.m. EST this Thursday or catch the replay on our YouTube channel!](#)

(And hey, if you're feeling stuck, [you can always reach out](#) - I've got some templates that might help you get started.)

Have you created a skills matrix for your team? I'd love to hear about your experience and what you've learned in the process. Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

February 19, 2025: Finding Your First AI Win

Last week, a member of our community shared something that hit home: “My CMO is pushing us to implement AI, but with our workload and deadlines, finding time to experiment feels impossible. What if we pick the wrong place to start?”

That tension - between the pressure to innovate and the reality of running a marketing department - is something I’m hearing from leaders across our community. Let’s talk about how to find the right starting point that actually makes your life easier, not harder.

What “Easy” Really Means in Marketing AI

One of our clients, a content marketing manager at a B2B tech company, made a discovery that changed her team’s approach. She realized that their first AI project didn’t need to be customer-facing content or complex campaign automation. Instead, they started with something they could confidently evaluate: internal briefing documents.

“We were spending hours creating briefs for our creative team,” she explained. “We knew exactly what good briefs looked like, could easily spot any issues, and had plenty of past examples. It was perfect for testing AI.”

Finding Gold in the Mundane

Another community member, a digital marketing director, shared an approach that revealed surprising opportunities. His team tracked their “productivity thieves”—those marketing tasks that felt like they were always getting in the way of strategic work:

- Transforming analytics data into narrative reports
- Creating first drafts of social media calendars
- Converting technical product specs into marketing bullet points
- Summarizing customer feedback into actionable insights
- Writing initial outlines for blog posts and whitepapers

Let’s look at how one team turned these insights into action using our 5P Framework.

A Real Marketing Team’s First AI Win

A marketing team at a mid-sized SaaS company was buried in monthly reporting. Every month, they spent days pulling data from multiple platforms and crafting it into meaningful narratives for stakeholders. Here’s how they approached their first AI implementation:

Purpose

They needed to reduce report creation time without sacrificing insight quality. The goal

wasn't to automate the entire process, but to speed up the first draft while maintaining their analytical rigor.

People

The marketing analysts on the team were:

- Skilled at interpreting data
- Confident in spotting numerical errors
- Ready to try something new
- Clear about what made a good report

Process

They started small—using AI to help with just the executive summary section. They created a simple prompt template:

“Analyze the following marketing metrics for [Month Year]:

[pasted metrics]

Create an executive summary that:

- Highlights key changes from last month
- Explains significant trends
- Suggests potential factors influencing changes

Use a professional but conversational tone.”

Platform

They chose a tool that:

- Could handle data and narrative together
- Integrated with their existing workflow
- Had strong privacy features for sensitive data
- Fit within their existing tool budget

Performance

The results after one month:

- Report creation time reduced by 6 hours
- Consistency improved across different team members
- Stakeholder feedback remained positive
- Team had more time for deep analysis

Red Flags: When a Task Isn't Ready for AI

Through our community's experiences, we have identified warning signs that a task might not be the right starting point:

1. No clear quality criteria - if you can't quickly determine whether the output is good, start elsewhere
2. High strategic risk - avoid starting with tasks that are directly tied to revenue or major stakeholder relationships
3. Complex approval processes - tasks requiring multiple reviewers are harder to iterate quickly
4. No existing examples - AI works best when you can show it what "good" looks like

Your Next Step: The Marketing Task Audit

For the next 24 hours, notice which marketing tasks make you think:

"This basic work is keeping me from strategic thinking."

"I do this repetitive task every week/month."

"I know exactly what success looks like here."

"Any mistakes would be easy to catch and fix."

These are your potential first AI projects—tasks where you can build confidence while reclaiming time for strategic work.

Making the Case to Leadership

Once you've identified your starting point, frame it in terms of concrete business impact:

"We're starting with our monthly reporting process because:

- We can measure time saved precisely
- Quality is easily verifiable
- Risk is minimal
- Success here unlocks strategic thinking time
- ROI will be clear within one month"

Remember, you're not just looking for an easy win - you're building a foundation for strategic AI implementation while solving real problems in your marketing workflow.

What repetitive marketing task is consuming too much of your team's time? Let's discuss whether it might be your perfect starting point. I'd love to hear about your experience and what you've learned in the process.

Reply to this email to tell me, or [come join the conversation in our free Slack Group](#),

[Analytics for Marketers.](#)

- Katie Robbert, CEO

February 26, 2025: Reviews: The Human Connection AI Can't Replace

Last week, I was grabbing coffee with our Account Manager, Kelsey, when she brought up something that has been bothering her. "I feel weird about putting too many client testimonials on our website," she confessed. "Like, at what point does it just become bragging?"

I nearly choked on my latte. Not really, but I was taken aback.

"Kelsey," I said, "that's like a restaurant worrying it has too many five-star reviews on Yelp! Silly goose!"

This conversation stuck with me because it highlights something so fundamental about business today: in an increasingly AI-driven world, authentic human connections still drive our most important decisions. And what are reviews if not the digital form of the oldest marketing strategy in history – people telling other people about their experiences?

The Human Element AI Can't Replicate

Think about your own buying habits for a second. When you're considering a purchase, do you trust the perfectly polished marketing copy or the somewhat messy, imperfect reviews from real customers?

I know my answer. Last month, I was looking at two similar project management tools. One had sleek AI-generated descriptions that promised to solve all my problems. The other had dozens of detailed customer stories – some mentioning frustrations alongside their overall positive experiences. Guess which one I chose?

The human reviews won, hands down. Why? Because they contained something AI simply cannot replicate: authentic human experience.

The 5P Approach to Human-Centered Reviews

When I think about customer testimonials, I consider them through our 5P framework:

1. **Purpose:** Reviews create trust through shared human experience
2. **People:** They forge emotional connections between past and future customers
3. **Process:** They show how real humans experienced your service delivery
4. **Platform:** Where reviews live affects how authentic they feel
5. **Performance:** They measure human satisfaction, not just technical metrics

Why AI Can't Replace This Connection

There's been a lot of talk about AI writing everything from marketing copy to product

descriptions. But here's why AI can't replace genuine human testimonials:

Emotional Resonance

AI can't truly convey the relief a client felt when you solved their seemingly impossible problem. Only human words carry that emotional weight.

Shared Struggles

When a testimonial mentions specific challenges that were overcome, potential clients see themselves in those stories. AI can simulate this, but it lacks the lived experience.

Trust Signals

Humans are remarkably good at detecting authenticity. We've evolved to sense when something feels "off" about communication. Real testimonials have natural imperfections that signal truth.

Relationship Qualities

The best testimonials don't just praise your deliverables; they highlight how it felt to work with you. Was the process enjoyable? Were you responsive? Did you actually listen? These relationship qualities matter enormously.

Making Human Connections Through Testimonials

So how do we showcase testimonials in a way that emphasizes their human element?

1. **Preserve authentic language** Edit for clarity if needed, but keep the client's unique voice and phrasing intact.
2. **Include context and backstory** What was the client trying to achieve? What had they tried before? This context creates connection.
3. **Use visual evidence when possible** Photos, videos, or even Zoom screenshots add faces to names and enhance credibility.
4. **Highlight the relationship, not just results** Include feedback about how it felt to work with you, not just what you delivered.
5. **Connect testimonials to specific team members** When appropriate, show which team members the client worked with to humanize your organization.

The AI-Proof Testimonial Strategy

As AI becomes more prevalent, authentic human testimonials become even more valuable. Here's how to future-proof your approach:

- **Capture video testimonials** when possible – they're much harder for AI to fake convincingly
- **Include specific details** that only someone who truly used your service would know
- **Update regularly** to show ongoing human relationships, not past successes
- **Create conversation around testimonials** by responding publicly to thank clients
- **Connect testimonials to real profiles** on LinkedIn or other platforms

The Personal Touch in Testimonial Collection

One thing that helped Kelsey feel better was understanding how personalized our testimonial collection process is. We don't use automated systems – we have actual conversations:

1. Make a personal request to discuss their experience
2. Ask specific, open-ended questions
3. Listen for emotional language and personal impact
4. Follow up with personalized thanks (not automated responses)
5. Maintain the relationship even after collecting feedback

Your Human-Centered Testimonial Plan

Ready to emphasize the human connection in your testimonials? Start here:

1. **Review your current testimonials** – Do they sound like real people or marketing copy?
2. **Add context to existing feedback** – What was happening in the client's world when they worked with you?
3. **Create conversation** – Respond publicly to testimonials to show human interaction
4. **Highlight relationships** – Showcase the people who delivered the work alongside client feedback
5. **Connect testimonials to your community** – Integrate client voices throughout your content

Remember, in a world increasingly populated by AI-generated content, authentic human experiences stand out more than ever. Your testimonials aren't just feedback—they're evidence of real human connections that AI simply cannot replicate.

What's your approach to capturing the human element in your client testimonials? I'd love to hear about it in the comments!

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

March 05, 2025: Finding Your Joy in Generative AI

I've never been the person who gets excited about new tech just because it's new tech. When everyone was raving about the latest shiny object, I was thinking, "But does it actually solve a problem I have?" I'm not someone that loves to "tinker" with tech.

Last month, I found myself staring at a pile of seed packets on my kitchen table. I had grand plans for my garden this year, but the thought of manually creating a planting schedule made me want to abandon the whole project. Every seed packet has different but similar instructions. Seeds are temperamental if you get the timing and temperature wrong. I was totally overwhelmed.

That's when it clicked. What if I used generative AI to create my gardening schedule? Not because I wanted to play with AI, but because I wanted to get to the gardening part faster. I wanted to be outside, with my hands in the dirt, getting things going.

The Problem with Tech Adoption

Most tech demonstrations focus on the technology itself:

- "Look at this amazing LLM that can write poetry!"
- "See how this AI can generate images from text!"
- "Check out the code this model can write!"

That's all fascinating to tech enthusiasts, but for the rest of us? It's about as exciting as watching paint dry. No wonder adoption can be slow. I promise, this isn't an attack on those of you who are tech enthusiasts. I love you all.

The problem isn't the technology—it's how we're introducing it.

Finding Your Meaningful Use Case

What made generative AI click for me wasn't its technical capabilities—it was how it connected to something I actually care about. The key is identifying where technology can remove friction between you and activities that bring you value or joy:

1. **Identify your friction points.** What tasks do you consistently avoid or procrastinate on? These are prime candidates for technological assistance.
2. **Recognize your motivation drivers.** What activities energize you? Understanding what pulls you forward can help you find where tech can accelerate your path.
3. **Look for the "necessary but not fulfilling" tasks.** These transitional tasks—like my garden planning—are perfect for technological intervention.
4. **Consider your learning style.** Some people learn by doing, others by observing. The right tech introduction should match how you naturally process new information.

My AI Gardening Experience

When I used Gemini to create my gardening schedule, I simply:

1. Uploaded photos of my seed packets
2. Provided the Old Farmer's Almanac planting guide based on my zip code
3. Asked it to create a planting schedule based on my hardiness zone
4. Requested it to organize everything in a spreadsheet format with reminders

Was it perfect? Nope. I had to make some adjustments. But it saved me hours of research and organization that would have kept me inside instead of where I wanted to be—in my garden.

The tech wasn't the star. Getting to gardening faster was.

Making Tech Click for Others

If you're trying to encourage tech adoption, try this approach:

1. **Start with their motivation.** Ask: "What's something you love doing or need to do, but find certain parts tedious?"
2. **Connect the technology to that specific need.** Explain: "This tool can handle the tedious part so you can spend more time on what matters to you."
3. **Make it practical, not theoretical.** Show: Don't explain how AI works—show how it creates more time for what matters.
4. **Focus on results, not features.** Emphasize: "You will spend 70% less time on paperwork and more time with clients."

Finding Your Own Use Case

Here's a simple exercise I use with my clients:

1. List five tasks you do regularly but don't particularly enjoy
2. For each task, ask: "What would I rather be doing instead?"
3. Consider: "Could technology handle part or all this task?"
4. Start small: Pick one task where tech could help, and experiment

If you want to take this exercise to the next level, I'd recommend the [Trust Insights TRIPS Framework](#).

The most powerful tech adoption happens when we stop talking about the technology itself and start focusing on the freedom it creates. Now that I have a schedule for when to start my seeds indoors and outside, I can focus on what really makes me happy. All I have to do is execute the plan and then watch my reap what I sow.

Too corny?

Too bad.

What's a task that stands between you and something you actually want to be doing? That might be your perfect AI use case. I'd love to hear about it in the comments!

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

March 12, 2025: The Foundation Still Matters

I was sitting in a lecture hall at Worcester Polytechnic Institute (WPI) last week, speaking to a room of bright students through the Women in Data Science (WIDS) program. The energy in the room shifted noticeably when we got to the Q&A section, and a hand tentatively went up.

“What should we even be studying if AI is going to do all the work anyway?”

I could see the worry in her eyes, and looking around the room, it was clear many others shared the same concern. Having spent years building my career on technical skills that AI can now replicate in seconds, I understand that fear. Seriously, I do.

But here’s the thing – AI isn’t replacing you. It’s replacing the way you work.

The Human-Machine Partnership

Let’s talk about software development as an example. Yes, generative AI can spit out code faster than most humans can type. I’ve been amazed watching it generate in seconds what might have taken me hours.

But who’s telling the AI what to build? Who’s checking if that code actually solves the right problem? Who’s testing edge cases the AI might have missed?

That’s still you.

What’s happening isn’t job elimination – it’s job transformation. Instead of pairing with another developer, you’re now paired with a machine. The foundational knowledge you need hasn’t disappeared; it’s become even more critical.

Your Foundation Is More Important Than Ever

At Trust Insights, we talk constantly about two frameworks that remain essential regardless of how advanced AI becomes. Let’s dive deeper into each one:

The 5P Framework for Process

1. **Purpose:** Why are we doing this work? What business problem does it solve? This is where you identify the core objective and how it ties to business outcomes. For example, are you trying to improve customer retention, increase conversion rates, or streamline operations?
2. **People:** Who needs to be involved and what skills do they bring? This isn’t just about technical skills – it’s about domain expertise, stakeholder buy-in, and cross-functional collaboration. A successful AI implementation requires subject matter experts who understand the nuances of the business problem.

3. **Process:** What steps will we follow to complete the work? This includes defining workflows, governance, feedback loops, and how decisions get made. Even with AI doing much of the execution, you need a clear process for how humans review, validate, and incorporate AI outputs.
4. **Platform:** What tools will we use? This covers both the AI technologies and the supporting infrastructure. Are you using generative AI, predictive models, or computer vision? Do you have the right data storage, processing power, and integration capabilities?
5. **Performance:** How will we measure success? These are your KPIs and metrics that determine whether the work is delivering value. What quantifiable outcomes will tell you if the AI implementation is successful?

AI might help with the Platform component, but it can't determine Purpose. It can't understand the nuanced needs of People. It can follow a Process but can't design one from scratch that accounts for organizational quirks. And it certainly can't set meaningful Performance metrics tied to business value.

The 6C Framework for Data Quality

Just last month, I was working with a client who wanted to use AI to predict customer churn. They had invested in sophisticated AI tools but weren't seeing the expected results. When we dug into it, the issue wasn't the AI – it was the data. Their data failed several of our 6C quality checks:

1. **Clean:** Free from errors and inconsistencies
 - Are there duplicate records?
 - Have outliers been addressed?
 - Is the data formatted consistently?
- We found their customer behavior data had significant gaps due to system migrations.
3. **Complete:** No missing information
 - Are all required fields populated?
 - Do you have sufficient historical data?
 - Are there any sampling biases?
- Several key metrics had incomplete histories, making trend analysis unreliable.
5. **Comprehensive:** Covers all aspects needed to answer the question
 - Does the data include all variables that influence the outcome?
 - Are you capturing both digital and offline interactions?
 - Do you have visibility across the entire customer journey?
- They were missing important touchpoints from their mobile app, which skewed the analysis.
7. **Chosen:** Only relevant data, no noise
 - Have you filtered out irrelevant variables?
 - Is the data specifically selected to address your question?
 - Have you removed redundant or highly correlated variables?
- Their dataset included hundreds of variables, many of which weren't relevant to churn prediction.

9. **Credible:** Collected in a valid, trustworthy way
 - Is the data collection methodology sound?
 - Do you have confidence in the data sources?
 - Has the data been validated?
- Some of their customer feedback data came from a biased sample that wasn't representative.
11. **Calculable:** Usable by business users who need it
 - Can the data be easily accessed and analyzed?
 - Is it in a format that works with your tools?
 - Can non-technical stakeholders understand the outputs?
- The data was spread across multiple systems with inconsistent formatting, making it difficult to use.

After addressing these issues, their AI models started producing significantly more accurate predictions. The AI wasn't the problem – the data was.

Applying These Frameworks in the AI Era

So how do these frameworks help you stay relevant in the age of AI?

One of the most successful approaches is applying these frameworks as a diagnostic tool. When an AI implementation isn't delivering expected results, it's rarely because the AI technology itself is flawed. Almost always, the issues lie in the foundational elements – unclear business objectives, misaligned teams, broken processes, or poor-quality data.

By systematically evaluating each of the 5Ps and 6Cs, you can pinpoint exactly where the gaps are and address them directly. This is where human expertise becomes invaluable – understanding the interconnections between business goals, human factors, processes, technology, and data quality.

Bridging the Gap Between Humans and AI

This is where the opportunity lies for all of us – not in competing with AI, but in managing the interface between AI and business value. The most successful professionals I see today are those who can:

1. **Translate business needs into AI requirements:** Understanding what problems need solving and how AI can help
2. **Ensure data quality:** Applying the 6C framework to give AI the inputs it needs
3. **Design effective processes:** Using the 5P framework to integrate AI into workflows
4. **Interpret and contextualize AI outputs:** Adding the human judgment and domain expertise
5. **Bridge technical and business language:** Helping non-technical stakeholders understand and trust AI results

Moving Forward: Questions to Ask Yourself

Whether you're a student wondering about your future career or a professional adapting to AI, ask yourself these questions:

1. Do I understand the foundational principles behind the work I do? (Not just how to do it, but why it works)
2. Can I articulate how my work connects to business value?
3. Do I know how to evaluate the quality of data and processes?
4. Can I identify when AI is the right solution and when it isn't?
5. Am I building skills in areas that require human judgment, creativity, and contextual understanding?

If you can answer yes to these questions, you're building a foundation that will remain valuable regardless of how AI evolves.

The fear those students expressed at WPI is understandable, but their concerns are based on a misunderstanding of AI's capabilities. AI isn't making humans irrelevant – it's making the human role even more important. The key is to shift from doing the work to orchestrating how the work gets done.

Quick plug - if you want help navigating this change, [give me a shout!](#)

What questions do you have about adapting your skills for an AI-enhanced future? How are you seeing the relationship between humans and AI evolve in your organization? I'd love to hear about it in the comments!

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers.](#)

- Katie Robbert, CEO

March 19, 2025: Data Governance: The Step You Can't Skip

Picture this: Your demand gen team had just finished designing what you thought was the perfect ABM campaign. You've spent weeks aligning with sales on target accounts, creating personalized content journeys, and building out sophisticated trigger-based workflows in your marketing automation platform.

The day before launch, you are reviewing the final targeting parameters when you realize something concerning – you were planning to use firmographic data that had been appended by a third-party vendor six months ago, but nobody could tell you if your data processing agreement covered using that information for this specific type of outreach.

"No problem," you thought. "Legal can give us a quick answer."

Three weeks and seven email threads later, you discover that not only was your agreement insufficient for the planned usage, but half the data fields you had built your personalization strategy around were flagged as "questionable quality" in a data audit that nobody on the marketing team had seen.

You have to rebuild the entire campaign from scratch using only first-party data for which you have proper permissions. The delay cost you an entire quarter of pipeline generation.

Sound familiar? It happens to the best of us. So, how do we prevent this from happening? With data governance.

What Is Data Governance Anyway?

At its simplest, data governance answers three fundamental questions:

- Who owns and is responsible for the data?
- What exactly is the data (and what format is it in)?
- How can you properly access and use it?

These might seem like basic questions, but you'd be shocked at how many organizations – even sophisticated ones – struggle to answer them clearly.

The Painful Reality of Skipping This Step

Just recently, I watched a project get delayed by nearly four months because these questions weren't addressed upfront. After extensive planning and statement of work development, the analytics team was ready to dive in—only to discover that the privacy team had concerns about customer data usage that completely contradicted the proposed approach.

Everyone had assumed someone else had checked these boxes. No one had.

The frustrating part? This was entirely preventable.

Why Does This Keep Happening?

I've noticed a few patterns that lead to these situations:

1. **Siloed organizations:** Data, analytics, privacy, and legal teams operating independently without clear communication channels
2. **Excitement over results:** Focusing on the exciting insights rather than the foundational elements needed to get there
3. **Assumed knowledge:** "Someone must have already figured this out" thinking
4. **Pressure to move quickly:** Skipping what seems like bureaucratic steps to show progress

Building Your Data Governance Foundation

Before you even think about that fancy machine learning model or dashboard, make sure you:

1. **Identify your data stewards:** Who has ultimate authority over each data source? Get them involved early.
2. **Document your data inventory:** What exactly do you have? Where does it live? How is it structured? What are the quality issues?
3. **Establish access protocols:** Who can see what data, under what circumstances, and with what approvals?
4. **Clarify usage policies:** What can this data be used for? Are there regulatory or privacy restrictions?
5. **Create review processes:** How will new data uses be evaluated and approved?

The Benefits of Getting This Right

When you invest in proper data governance upfront:

- Projects move faster overall (despite the initial time investment-trust me on this one)
- Teams avoid frustrating and expensive mid-project pivots
- Data quality and reliability improve
- Regulatory risks decrease substantially
- Cross-functional collaboration becomes smoother

Moving Forward

If you're starting a new analytics initiative, I strongly recommend beginning with a data governance assessment. It might not be the most exciting kickoff activity, but I promise it will save you from that awful moment when someone asks, "Wait, are we even allowed to use this data?" after weeks or months of work.

And if you're in the middle of a project that's hitting roadblocks because of unclear data ownership or access issues? It's never too late to pause and build that foundation properly.

Remember: the best analysis in the world is worthless if you can't actually implement it because of governance issues that should have been addressed at the start.

Quick plug—if you want help navigating your data governance, [give me a shout!](#)

Have you experienced a project derailment due to overlooked data governance? I'd love to hear your stories and how you addressed them.

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers.](#)

- Katie Robbert, CEO

March 26, 2025: Change Management: Navigating SEO for AI

I've been thinking a lot about the shift happening in SEO lately. We're no longer just optimizing for Google's algorithms and human readers – we're now optimizing for AI systems too. This is creating some fascinating change management challenges for marketing teams everywhere.

The Change Management Reality of AI SEO

Change management is always tough. But it is especially challenging when the change involves something as technical as optimizing content for AI systems. I experienced this firsthand recently when trying to adapt AI-optimized content strategies to our team.

When I was first introduced to AI-optimized content, my first thought was, "Why does this look so different from what we've been doing?" And, "How am I going to communicate this difference?"

These simple questions highlighted the core change management challenge: helping smart, capable professionals understand a fundamental shift in how we approach content creation without drowning them in technical jargon.

The Two-Audience Reality

The core of this change is that our content now needs to serve two distinct audiences:

1. Humans who want clear, engaging, and helpful information
2. AI systems that need structured, comprehensive data that they can parse

This isn't just a technical SEO adjustment. It's a fundamental shift in how we create, structure, and distribute content. And like any significant change, managing it effectively requires more than just explaining the technical details.

Change Management Is Human Management

What I've learned through this process is that change management isn't really about managing change – it's about managing how humans respond to change. Understanding the technical aspects of AI optimization is actually the easy part. The hard part is helping people adapt their thinking, processes, and expectations.

When Chris jumped straight into explanations about semantic entity relationships and natural language processing signals, he was addressing the wrong problem. The real challenge wasn't a knowledge gap; it was helping team members (me) connect this new approach to what they already understood about effective content.

Using the 5P Framework for AI SEO Change

I've found the 5P framework incredibly helpful for managing this transition:

1. **Purpose:** Clearly articulate why the change is necessary (ensuring content remains discoverable as search evolves)
2. **People:** Identify who will be impacted and how (content teams, SEO specialists, clients)
3. **Process:** Define the new workflows and approaches (content creation, optimization, measurement)
4. **Platform:** Determine what tools and technologies are needed (schema markup tools, AI content analyzers)
5. **Performance:** Establish how success will be measured (visibility in both traditional and AI-generated search)

This framework provides structure, but I've discovered it's most effective when combined with genuine human connection and small, practical examples.

The Human Side of Technical Change

What I've come to appreciate most about managing this transition is that the human elements far outweigh the technical ones. Yes, understanding AI optimization techniques matters. But understanding how people process and adapt to change matters more.

When I focus on helping clients see how this evolution connects to their strategy, I try to focus on real examples of where they have previously navigated change successfully. They need to see themselves in each situation so they can relate to it. It isn't about dumbing things down – it is about providing context that makes the unfamiliar feel manageable.

Your AI SEO Change Management Checklist

If you're navigating this shift in your organization, here are some practical steps:

1. Start with a small, measurable test case rather than a complete content overhaul
2. Document baseline metrics before making any changes
3. Create plain-language explanations of AI optimization techniques (avoid jargon!)
4. Find champions at different levels within your organization
5. Anticipate questions and prepare concrete examples that address them
6. Celebrate and communicate early wins widely

Remember that resistance usually isn't about the technology – it's about the uncertainty that comes with change. The more you can make this feel like evolution rather than revolution, the less resistance you'll face.

Change management for AI SEO isn't really about AI or SEO at all. It's about people. Focus on the human side of the equation, and the technical side will follow.

Quick plug—if you want help with this change management, [give me a shout!](#)

Has your team started optimizing content for AI systems? I'd love to hear about your experiences, especially the human side of managing this change.

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

April 02, 2025: Why Failing Up is a Business Liability in the AI Era

We've all been there. You're sitting in yet another meeting watching a colleague present their quarterly results. On paper, the numbers were abysmal. Customer satisfaction had tanked, team turnover was at an all-time high, and their projects were consistently behind schedule.

Yet somehow, by the end of the meeting, they were being congratulated. Two weeks later? They got promoted.

Ok, maybe it wasn't that smooth and swift, but you get the idea. Another classic case of "failing up" - where mediocre (or worse) performance somehow leads to career advancement. And in today's business landscape, it's not just annoying - it's actually dangerous.

What Exactly is "Failing Up"?

"Failing up" happens when someone advances despite mediocre or poor performance, typically due to factors beyond merit, such as:

- Strong networkers who "play the game" better than they do their actual job
- People who match the existing company culture (aka look/think like leadership)
- "Safe" choices who won't rock the boat or challenge the status quo
- Those skilled at deflecting blame or taking credit for others' work

I once worked with a director who consistently missed targets and had alienated more than half of their team. Their response to criticism? Reframing failures as "learning opportunities" while taking credit for the few successful projects (which, coincidentally, were run by their direct reports). Six months later? VP of their department.

Why It's Extra Problematic in the AI Era

With AI becoming more of a necessity in business, failing up isn't just frustrating - it's increasingly dangerous to business. Here's why:

1. **AI demands new competencies.** The integration of AI requires leaders who can genuinely understand and navigate technological change. Not just talk about it in meetings.
2. **Strategic thinking is more critical than ever.** With AI handling more routine tasks, human value comes from creative problem-solving and strategic insight. Precisely what mediocre performers often lack.
3. **Teams need authentic leadership.** As work environments become more complex, teams need leaders who can genuinely guide them through change. Not just those who excel at office politics.
4. **Innovation requires risk-takers.** Companies that reward mediocrity and "safe" choices will fall behind those willing to promote genuine innovators and creative

thinkers.

5. **Ethical challenges require ethical leaders.** The AI revolution raises important ethical issues. It needs leaders with true integrity, not those who get ahead by taking shortcuts.

The Real-World Impact

Here's what's happening today. Companies often choose someone to lead AI integration based on their presentation skills and connections. This happens even when teams say the person lacks technical knowledge and has poor project management skills.

Six months later? The implementation will be millions over budget, morale will collapse, and competitors will have leapfrogged them. The cost of failing up isn't just frustration. It can cost you revenue, resources, and customers.

Breaking the Cycle

Ok, so what can we actually DO about this? Here are seven practical approaches:

1. *Implement SMART Goals*

Generic advice says "measure performance objectively" - but how do you actually do that?

Start by defining success metrics before projects begin, not after. Document these in shared workspaces where everyone can see them. Include both outcome metrics (what was achieved) and process metrics (how they were achieved). Consider using SMART goals. SMART stands for Specific, Measurable, Achievable, Relevant, and Timely. Using a template can help ensure your goals are consistent and easier to track.

Don't just track "implemented new AI tool," but also measure adoption rates, efficiency gains, team satisfaction, and whether it was delivered on time and budget.

Make reviews data-informed by requiring specific examples and evidence rather than general impressions. This makes it harder for charismatic under-performers to talk their way around actual results.

2. *Gather Genuine 360-Degree Feedback*

Emphasis on the word "genuine." If you're asking for feedback, make sure you're going to do something with the data.

Create regular (quarterly to start) feedback mechanisms where team members can provide anonymous input on leaders. Use specific questions like "How effectively does this person remove obstacles for the team?" rather than vague rating scales.

Consider feedback from direct reports as heavily as feedback from superiors; those

experiencing someone's daily leadership often have the clearest perspective on its quality.

Most importantly, make feedback meaningful by tying it directly to business goals that everyone understands.

3. Value Demonstrated Outcomes Over Confidence

Confidence is often mistaken for competence, especially in leadership roles. You can combat this by creating opportunities for blind evaluation where decision-makers don't know who proposed which solution. This helps eliminate the "loudest voice wins" problem.

You need to create a space where everyone's ideas can be heard and considered.

Celebrate and reward accurate analysis and good outcomes, not just assertive presentations or bold promises. Make "being right" more valuable than "sounding right."

4. Create Advancement Paths for Individual Contributors

Many organizations force their best resources into management. Then they wonder why they have mediocre managers. This is not the fault of the individual contributor. Many people take a management role because it is the only path to more money. Instead of this, develop parallel career tracks with equivalent compensation and status for these team members. Your best engineer shouldn't need to become a subpar manager to earn more.

Create advisory roles that influence strategic direction without requiring management responsibilities. This keeps your technical expertise in positions of influence.

You can also acknowledge and reward specialized skills with certification programs and knowledge-sharing platforms. These options allow for growth without needing to be a manager.

*5. Consciously Diversify Leadership Selection**

"Culture fit" often becomes code for "reminds me of myself." You can start to break this pattern by using structured interview protocols that focus on demonstrated capabilities rather than personal chemistry or background similarities. Do blind reviews of resumes and look only at capabilities. This removes identifying information that could create bias.

Engage diverse selection panels that include people from various departments, backgrounds, and thinking styles. Set clear diversity goals for leadership roles. Focus not just on demographics but also on cognitive diversity and different work experiences.

*Note—this suggestion is easier said than done. Depending on your role in your organization, this one may be out of reach.

6. Reward Ethical Decision-Making

Ethics often takes a backseat to results in advancement decisions. Rebalance this by:

Creating specific recognition programs for ethical leadership moments. Make these visible across the organization.

Including ethics scenarios in leadership assessments that evaluate how candidates handle complex situations with competing pressures.

It's important to document and celebrate times when leaders made tough but right decisions. These choices may not have been easy or instantly profitable, but they count. Make ethics part of the success stories.

7. Develop Better Selection Processes

Traditional interviews reward those who interview well, not necessarily those who perform well. You can change this by using work simulations that require candidates to demonstrate skills rather than just talk about them. For AI leadership roles, this might involve analyzing an implementation challenge or a resistant team member.

Set up probationary leadership periods for new promotions. They should have clear performance goals for the first 90 days. Advancement depends on meeting these goals.

The Bottom Line

I've seen firsthand how teams thrive under genuinely capable leadership and wither under those who've failed upward. The stakes were always high, but in today's rapidly evolving business landscape, they're astronomical.

The companies that will thrive aren't those with the slickest presenters or best networkers in leadership positions - they're the ones that can identify, develop, and promote genuine talent and ethical leadership.

Breaking the "failing up" cycle isn't just about fairness—it's about building organizations that can thrive in rapidly changing environments. When we promote based on genuine capability rather than presentation skills or political savvy, we create resilient teams that can navigate the complex challenges of the AI era.

What's your experience with "failing up" in your organization? Have you found effective ways to combat it? I'd love to hear your thoughts and strategies. Reply to this email to tell me, or join the conversation in our free Slack group, [Analytics for Marketers](#).

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

April 09, 2025: Approaching AI Integration Strategically - Part 1

The pressure to adopt AI is everywhere, but rushing in without a strategy is like me trying to walk my 125 lb dog without a leash or cheese. In that scenario, she's off and running, and I have no way to recall her back to me. Needless to say, not a great approach.

I keep hearing from people stating they have been told by their leadership to "implement AI across the organization" by the end of the quarter. When I ask what problem they are trying to solve with AI, there is that uncomfortable silence I've come to recognize all too well.

"I don't know," they will finally admit. "Leadership just read something about how everyone needs AI now or they will fall behind."

Sound familiar?

What an AI Strategy Is and Isn't

Let's get something straight: AI is not a strategy. AI is a tool – a powerful one, yes, but still just a tool. Your strategy explains *why* you're implementing AI and what business problems you're trying to solve.

An AI strategy statement might look something like: "We are integrating AI capabilities to improve customer service response times and accuracy, reducing resolution time by 50% while maintaining our high satisfaction scores."

Notice how specific that is? It's not just "let's do AI" – it explains why AI makes sense for your business goals.

Here's what an AI strategy is NOT:

- It's not a list of AI tools you plan to purchase
- It's not "because our competitors are doing it"
- It's not a shiny object to impress stakeholders
- It's not a replacement for human expertise

I can't tell you how many times I've seen companies throw money at expensive AI tools without first understanding what they need those tools to accomplish. That's a recipe for wasted resources and frustrated teams.

The STEM Framework for AI Integration

When approaching AI integration, I find it helpful to use our STEM framework to organize thinking and create an actionable plan:

- **Strategy:** Why are we implementing AI?
- **Tactics:** What specific AI applications will we use?
- **Execution:** How will we implement and manage these tools?
- **Measurement:** How will we know if our AI implementation is successful?

Let me break this down with a real example from a client who wanted to use AI for content creation:

Strategy (Why): To scale our educational content production to reach more potential clients while maintaining quality and reducing the burden on our subject matter experts.

Tactics (What):

- Implement AI writing assistant for first drafts
- Use AI for content optimization and SEO
- Create AI-powered content templates for consistent quality

Execution (How):

- Train content team on effective AI prompt engineering
- Establish editorial workflow that combines AI and human expertise
- Create content governance guidelines for AI usage

Measurement (How we'll know):

- Track content production volume (aiming for 3x increase)
- Measure time saved for subject matter experts
- Monitor content quality scores and engagement metrics
- Compare ROI of AI-assisted content vs. previous methods

The framework helps ensure that every part of your AI implementation links back to your core strategy. Without this connection, you're just chasing technology for technology's sake.

Why Starting with Measurement Matters

I'm going to tell you something that might seem backward at first: with AI implementation, I always recommend starting with the measurement piece. Here's why:

Many AI initiatives fail because organizations can't actually quantify their impact. They "feel" like the AI is helping, but they can't prove it—which makes it nearly impossible to justify continued investment.

I learned this lesson the hard way. At a previous company, we implemented an AI tool for customer segmentation that the vendor promised would "revolutionize" our marketing. Six months and many thousands of dollars later, we couldn't definitively say whether it had improved anything.

The problem wasn't the tool itself – it was that we hadn't clearly defined:

1. Our current baseline metrics
2. What specific improvements we expected
3. How we would measure success

Now, I always start AI strategy discussions with these questions:

- What metrics are we trying to improve?
- What are our current numbers?
- What improvement would make this investment worthwhile?
- How and when will we measure the impact?

Where to Start with Your AI Strategy

If you're feeling overwhelmed about creating an AI integration strategy, here's a simple approach to get you started:

1. **Identify pain points** - Where are your teams spending the most time on repetitive tasks? Where do you have bottlenecks? These are often good candidates for AI assistance.
2. **Define clear objectives** - What specifically do you want AI to help you achieve? Be concrete (e.g., "reduce document processing time by 40%" rather than "improve efficiency").
3. **Start small—choose** one well-defined use case for your first AI implementation. Success here will build confidence and knowledge for bigger projects.
4. **Create a skills plan** - What skills will your team need to work effectively with AI? This might include prompt engineering, data preparation, or AI governance.
5. **Establish ethical guidelines** - How will you ensure your AI use aligns with your values and maintains trust with customers?
6. **Set up measurement systems** - How will you track the impact of your AI implementation on your business metrics?

Remember: AI strategy doesn't have to be complex. It just needs to connect the technology to your business goals and provide a framework for measuring success.

Next week, I'll dive deeper into our 5P Framework (Purpose, People, Process, Platform, and Performance) and how it can be applied specifically to AI integration planning.

In the meantime, I'd love to hear: What's your biggest challenge when it comes to implementing AI in your organization?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

April 16, 2025: Approaching AI Integration Strategically - Part 2: The 5P Framework

Last week, I found myself in a meeting where an executive announced they had purchased an enterprise AI platform subscription. When someone asked how we would use it, the executive's response was essentially, "Figure it out."

I watched the room fill with that awkward mix of confusion and forced enthusiasm that happens when leadership skips the strategy part and jumps straight to implementation.

In Part 1 of this series, I talked about using the STEM framework to organize your AI strategy. Today, I want to introduce you to another framework we use at Trust Insights: the 5P Framework. This is especially helpful when you're trying to implement something complex like AI across your organization.

The [5P Framework](#) for AI Integration

The 5P Framework breaks down planning into five essential components:

- **Purpose:** What problem are you solving?
- **People:** Who needs to be involved?
- **Process:** How will you solve the problem?
- **Platform:** What tools will you use?
- **Performance:** How will you measure success?

Let me walk through each one specifically for AI integration.

Purpose: Defining the Problem AI Will Solve

I can't emphasize this enough: Start with the problem, not the technology.

When I work with clients on AI integration, I ask them to complete this sentence: "As a [persona], I [want to], so [that]."

If they can't articulate a clear business problem and outcome, we stop and do that work first. Because here's the reality: AI is expensive, it requires significant resources to implement correctly, and it will disrupt your existing workflows. You need a compelling reason to go through all that.

Some legitimate purposes for AI implementation include:

- Reducing time spent on repetitive, low-value tasks
- Scaling personalization beyond what is humanly possible
- Analyzing massive datasets to find patterns
- Improving accuracy of predictions or recommendations
- Accelerating content creation while maintaining quality

Notice that none of these purposes is “because our competitors are doing it” or “because our CEO read about it.” Those aren’t purposes – they’re shiny objects.

People: The Human Side of AI

Here’s where I see most AI implementations start to break down. Companies focus so much on the technology that they completely overlook the human element.

For AI to succeed, you need to consider:

1. **Skills Gap Assessment:** What AI-related skills does your team currently have, and what skills will they need? This might include prompt engineering, AI tool configuration, or data preparation.
2. **Training Plan:** How will you upskill your existing team? Will you bring in external experts?
3. **Change Management:** How will you help your team adapt to new AI-driven workflows? (Spoiler alert: sending one email announcement isn’t enough.)
4. **Roles and Responsibilities:** Who will “own” the AI initiative? Who will be responsible for governance and oversight?

A few years ago, I worked with an agency that implemented a powerful CRM but didn’t train their team on how to use it effectively. Six months later, they had spent \$60,000 on the platform, and only two people in the entire organization were using it (me, as the admin, being one of them). I remember sitting through a very contentious meeting with the VPs. They were very upset about having “one more thing” to do.

A successful AI implementation (or any tech implementation) requires champions, trained users, and clear ownership. Without addressing the people component, your expensive AI tools will collect digital dust.

Process: Creating AI Workflows That Work

When it comes to integrating AI into your organization, process is everything. You need to think about:

1. **Integration Points:** Where exactly will AI fit into your existing workflows?
2. **Human-in-the-Loop Design:** How will humans and AI work together? Where is human oversight necessary?
3. **Data Flows:** How will data move into and out of your AI systems?
4. **Governance:** What rules and guidelines will govern your use of AI?
5. **Quality Control:** How will you ensure that the AI is producing acceptable outputs?

I learned the importance of process design the hard way. At a previous company, we implemented a sharepoint/project management system without clearly defining where it fit in our PLC/SDLC. The result was confusion, duplicated efforts, and ultimately, after three failed rollouts, the system was scrapped.

A better approach is to map your existing processes first, then identify specific points

where AI can add value. For example, in a content creation workflow, AI might help with:

- Initial research and topic clustering
- First-draft generation
- SEO optimization
- Grammar and style checking

But humans might still handle:

- Strategic content planning
- Expert review and fact-checking
- Final editing and approval
- Publication and distribution

The key is being intentional about where AI fits and where humans remain essential.

The more detailed your process documentation, the better your odds of a smooth AI integration. If you think you're getting too "in the weeds," you're not. Clear process is the foundation for successful AI.

Platform: Choosing the Right AI Tools

Only after you've defined your purpose, people strategy, and processes should you start thinking about which AI platforms to use.

When evaluating AI platforms, consider:

1. **Capability Match:** Does the tool actually do what you need it to do? (This sounds obvious, but you'd be surprised how many companies buy tools based on buzzwords rather than actual capabilities.)
2. **Integration Requirements:** Will it work with your existing tech stack?
3. **Scalability:** Will it grow with your needs?
4. **Total Cost of Ownership:** Beyond the subscription fee, what will implementation, training, and maintenance cost?
5. **Governance Features:** Does it provide the transparency and control you need?

I've seen too many companies start with the platform ("We need [insert trendy AI tool of the week]!") rather than starting with the problem. That's like buying an expensive kitchen gadget before knowing what you want to cook.

Instead, your platform selection should be the natural outcome of your purpose, people, and process planning.

Performance: Measuring AI Success

Finally, we come to performance – how you will measure the success of your AI implementation.

This takes us back to the measurement discussion from Part 1, but with more specificity:

1. **Baseline Metrics:** Document your current performance on key metrics before implementing AI.
2. **Success Criteria:** Define what “good” looks like. Is it a 20% reduction in time? A 30% increase in output? A 15% improvement in accuracy?
3. **Measurement Plan:** Determine how and when you will collect data to evaluate your AI implementation.
4. **ROI Calculation:** Establish how you will calculate the return on your AI investment.
5. **Feedback Loop:** Create mechanisms to gather qualitative feedback from users and stakeholders.

When I work with clients on AI implementation, I insist that we establish these measurement criteria before we even start looking at platforms. Why? Because without clear success metrics, you'll never know if your AI investment is worthwhile.

Putting It All Together: The 5P AI Strategy Document

Now, let's put all this together into a simple AI strategy document template:

1. **Purpose Statement:** “As [insert company] we [want to integrate AI], so [that we can solve a specific business problem and reach a defined goal].”
2. **People Plan:**
 - Skills required
 - Training plan
 - Roles and responsibilities
 - Change management approach
3. **Process Design:**
 - Current workflow mapping
 - AI integration points
 - Human-in-loop design
 - Quality control mechanisms
4. **Platform Selection Criteria:**
 - Required capabilities
 - Integration requirements
 - Budget constraints
 - Evaluation method
5. **Performance Metrics:**
 - Current baseline metrics
 - Success criteria
 - Measurement approach
 - Review timeline

This doesn't need to be a 50-page document. In fact, I prefer a concise 2-3 page strategy that clearly articulates each of these five elements.

[Get your copy of the 5P Framework here](#)

Start Small, Learn Fast

One final piece of advice: start small with your AI implementation. Pick one well-defined use case where AI can deliver clear value, and use that as your learning opportunity.

I worked with a client who wanted to implement AI across their entire content marketing operation simultaneously. Instead, I convinced them to start with just one content type for one product line. This allowed them to learn, refine their approach, and demonstrate value before scaling – ultimately leading to a much more successful organization-wide rollout.

In Part 3 of this series, I'll dive deeper into implementation planning and change management for AI integration.

In the meantime, I'd love to hear what aspect of the 5P Framework you find most challenging when it comes to AI strategy.

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

April 23, 2025: Approaching AI Integration Strategically - Part 3: Implementation

I once sat through a painful meeting where an executive asked for a status update on a new tech implementation. When the project lead proudly announced they had purchased licenses and completed initial training, the executive asked, "But what results are we seeing?"

Yeeesh. There is no pleasing some people.

In parts 1 and 2 of this series, I covered the STEM and 5P frameworks for AI strategy. Today, I want to focus on what happens after the strategy is in place: implementation planning. Because let's be honest - this is where most AI initiatives either succeed spectacularly or crash and burn.

This is a bit of a longer post because, well, implementation is hard. Scratch that. Implementation is easy. Good, sustainable and measurable implementation is hard.

The Implementation Roadmap: More Than Just "Turn It On"

When I talk to organizations that are struggling with AI adoption, I often find they've skipped creating a proper implementation roadmap. They went from strategy to execution without the critical planning step in between.

A solid AI implementation roadmap should include:

1. Phased Approach

When you're excited about AI, you want to implement everything at once. But trust me on this: a phased approach works better.

At Trust Insights, we recommend breaking AI implementation into distinct phases:

- **Phase 1: Pilot** - Select one specific use case with high potential value and low implementation complexity
- **Phase 2: Expand** - Roll out to additional use cases based on lessons from the pilot
- **Phase 3: Integrate** - Connect AI systems with broader organizational workflows
- **Phase 4: Optimize** - Refine based on performance data and user feedback

I worked with a client who wanted to implement AI for everything simultaneously. You should have seen their list - it included customer service, marketing, HR, and internal operations. It was overwhelming to look at. Instead, we convinced them to start with email response automation - a contained use case with measurable impact. The lessons they learned in that pilot (about data quality, user adoption, and performance evaluation) proved invaluable when they expanded to other areas.

2. Timeline with Dependencies

Your implementation timeline needs to identify not only when things will happen, but what dependencies exist between different elements.

For example, before you can train users on your new AI system, you need to:

- Finalize platform selection
- Complete technical setup
- Establish governance guidelines
- Create training materials

Mapping these dependencies helps avoid the dreaded situation where you've promised results by a certain date but haven't accounted for all the preliminary steps required.

I once had a client insist they could roll out their AI content system in two weeks. When we mapped the dependencies, including data migration, team training, and workflow reconfiguration, it became clear that eight weeks was more realistic. Setting accurate expectations early prevented what would have been a very uncomfortable conversation later.

3. Resource Allocation

This is where I see most implementation plans fall short: they do not specify who will do what.

Your implementation plan should clearly identify:

- Who is responsible for technical setup
- Who will develop training materials
- Who will provide subject matter expertise
- How much time each person needs to allocate (and what they're going to stop doing to make that time available)

Remember in Part 2 when we talked about "People" and who needed to be involved? This is when you'll use that analysis. I've seen too many AI projects assigned as "side jobs" to people who are already at full capacity. Surprise! Those projects rarely succeed.

I remember one organization where the marketing director casually told a team member, "Oh, and you'll be leading our AI implementation. It shouldn't take much time." Six months later, nothing meaningful had happened because the person had a full-time job already. The AI initiative became that thing they'd get to "when there's time" – which, of course, was never.

Preparing Your Team: The Human Side of Implementation

Let's talk about something that gets overlooked way too often: preparing your people for AI implementation.

Even the most sophisticated AI system will fail if your team doesn't adopt it. Here's how to set your team up for success:

1. Address the Fear Factor

Real talk: when you announce an AI implementation, many of your team members will immediately think, "Is this going to replace me?"

Instead of ignoring this fear, address it directly. Be transparent about:

- How AI will change roles (not eliminate them)
- What new skills team members will develop
- How AI will eliminate tedious tasks and create space for more valuable work

2. Develop a Training Program

Training for AI implementation should go beyond "how to click buttons." It should include:

- **Conceptual understanding:** How does the AI work? What are its strengths and limitations?
- **Practical skills:** How do you use the specific platform? How do you write effective prompts?
- **Integration knowledge:** How does the AI fit into existing workflows?
- **Troubleshooting:** What do you do when the AI doesn't perform as expected?

3. Create Champions and Support Systems

Every successful AI implementation I've seen has had internal champions—people who are excited about the technology, learn it thoroughly, and help others adopt it.

Identify these potential champions early and:

- Give them advanced training
- Involve them in implementation decisions
- Recognize their contributions
- Allocate time for them to help others

At a different company when we launched a new project management system (not AI, but the principle is the same), I made sure to identify champions in each department. These weren't necessarily the most senior people – they were the ones who showed genuine interest. They became our first line of support, and their enthusiasm was contagious.

Additionally, establish ongoing support systems like:

- Regular Q&A sessions
- Troubleshooting channels
- Best practice-sharing forums
- Office hours with experts

Next Steps: Moving from Implementation to Measurement

Even the best implementation plan is meaningless without a way to measure its impact. In

Part 4 of this series, I'll dive deep into creating a measurement framework for your AI initiatives—because if you can't measure it, you can't improve it (or justify the investment).

I'll cover:

- How to establish baseline metrics before implementation
- Defining clear success criteria
- Creating a measurement plan
- Calculating the ROI of your AI investments

In the meantime, I'd love to hear: What part of AI implementation do you find most challenging?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

April 30, 2025: Approaching AI Integration Strategically - Part 4: Measurement Framework

In Part 1 of this series, we talked about the STEM framework where the “M” stands for Measurement. In Part 2, we covered the 5P framework where “Performance” is the final P. Today, I want to show you how these pieces come together to create a measurement framework that connects your AI implementation directly to your business KPIs.

The Business KPI Connection: Why It Matters

Early in my career, I led a marketing automation implementation that cost \$120,000 annually. Six months in, our CFO asked, “What are we getting for our money?”

I had plenty of activity metrics – emails sent, open rates, click rates – but I couldn’t connect those to business outcomes. I couldn’t tell him if the \$120,000 was worth it. Baby Katie was out of her depth.

That experience taught me something crucial: measure what matters to the business, not just what’s easy to measure.

Connecting AI Metrics to Business KPIs

Remember in Part 1 when we defined our AI purpose statement? And in Part 2 when we identified our business problems under the “Purpose” section of the 5P framework? Now we’re going to connect those directly to measurement:

1. Map Your AI Purpose to Business KPIs

Start by revisiting your purpose statement. Your statement should have clearly articulated why you’re implementing AI. Now, identify which specific business KPIs this purpose will impact:

AI for content creation:

- Customer acquisition cost
- Conversion rate
- Revenue growth

AI for customer service:

- Customer satisfaction
- Retention rates
- Support cost per customer

AI for data analysis:

- Decision-making speed
- Forecast accuracy

- Revenue per insight

In Part 2 I asked you to complete the sentence: “As a [persona], I [want to], so [that].” The “so that” part should directly connect to these business KPIs.

Doing the work upfront will save you time on the back end. Gather your information, get organized, and use the frameworks to set yourself up for success.

2. Establish Your Business Baselines

In Part 2’s “Performance” section, we talked about defining what success looks like. Here’s where you put that into practice by documenting current performance:

- **Business metrics:** Current performance on the business KPIs you’ve identified
- **Operational metrics:** Current efficiency, quality, and cost metrics for the processes you’re enhancing

Be specific, just like we discussed in the “Performance” section of the 5P framework. “We currently acquire customers at an average cost of \$250, with our content marketing channel performing 15% better than other channels” is much better than “Our content marketing works well.”

3. Define Success in Business Terms

Remember when I said measurement is everything? This is where you define exactly what “success” means in terms of your business KPIs:

Customer acquisition cost:

- Current: \$250 per customer
- Target with AI: \$200 per customer
- Timeframe: 6 months

Support cost per ticket:

- Current: \$15 per ticket
- Target with AI: \$9 per ticket
- Timeframe: 3 months

Forecast accuracy:

- Current: 75% accurate
- Target with AI: 90% accurate
- Timeframe: 9 months

This connects directly to your “Performance” P from the 5P framework, where we talked about how you’ll know if you have succeeded.

4. Calculate Business-Focused ROI

In Part 2, we discussed the importance of ROI calculation as part of the “Performance” P. Now it’s time to put that into practice:

1. AI costs: Platform fees (from “Platform” P) + implementation + training (from

“People” P)

2. Business benefits: Direct revenue increases + cost reductions + margin improvements
3. $ROI = (Benefits - Costs) \div Costs$

For example, a client implemented AI for customer service with this calculation:

- Costs: \$125,000 (platform + implementation)
- Annual benefits: \$576,000 (cost savings) + \$400,000 (retention value)
- First-year ROI: 680%

This connects your “Platform” costs directly to your “Performance” benefits, completing the 5P circle.

Whew! Still with me?

A Simple Business-Aligned AI Measurement Framework

Here’s a streamlined framework that brings together the STEM and 5P concepts for an AI content marketing implementation:

Purpose (from 5P) / Strategy (from STEM):

- Implement AI content tools to scale content production and reduce customer acquisition costs

Business KPIs to Impact (Performance from 5P):

- Reduce customer acquisition cost from \$250 to \$200
- Increase conversion rate from 2.3% to 3.0%

Operational Metrics to Track (Process from 5P / Tactics from STEM):

- Increase content production from 20 to 60 articles/month
- Reduce content creation time from 8 to 4 hours per piece
- Maintain quality score (minimum 8.5/10)

AI Implementation Metrics (Platform from 5P / Execution from STEM):

- AI tool adoption rate among content team
- AI enhancement quality (measured by editor revisions needed)

Measurement Plan (Measurement from STEM):

- Weekly tracking of operational metrics
- Monthly tracking of business KPIs
- Quarterly analysis connecting AI metrics to business outcomes

ROI Calculation (Performance from 5P):

- Costs: \$56,000 (platform + implementation)
- Projected annual business impact: \$150,000 in reduced acquisition costs
- Projected ROI: 168%

Next Steps: Building Your Framework

1. Revisit your purpose statement from Part 1
2. Review your 5P analysis from Part 2
3. Identify which business KPIs your AI should impact (based on your “Purpose”)
4. Document current performance on those KPIs (baseline for your “Performance”)
5. Define success in terms of business outcomes (targets for your “Performance”)
6. Create a chain connecting your “Platform” metrics to your “Performance” metrics
7. Establish an ROI calculation focused on business impact

In Part 5, I’ll cover specific AI applications across different business functions, with practical examples of these measurement frameworks in action.

What business KPIs are you targeting with your AI implementation?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

May 07, 2025: Approaching AI Integration Strategically - Part 5: Now What? Putting It All Together

A marketing director once told me she'd spent over \$50,000 on AI tools but was "still figuring out" how to use them.

That's a problem.

But it's a solvable problem, and that's what we're here to do. Solve problems. I'll keep it short and sweet, and actionable this week.

Throughout this series, we've built a framework for AI integration covering strategy, planning, implementation, and measurement. Now let's address the critical question: **So what?** Let's put it all together with real-world applications and an actionable roadmap.

How to Identify Your Best AI Opportunities

I'll skip the personal anecdotes and get right to the good stuff. I would recommend the [Trust Insights TRIPS Framework](#) to map this out. It's a simple sheet that will help outline all your candidate tasks and help you prioritize where to start with AI.

TRIPS stands for Time, Repetition, Importance, Pleasantness, and Sufficient Data. As you list out your tasks and score the columns, you'll see your top winners for where to start with AI integration.

Start with high-value, easy-to-implement applications to build momentum.

High-Impact AI Use Cases to Consider

Here are some of the most successful AI applications we've implemented with clients:

Marketing Applications:

- AI-driven content topic research and first draft generation
- Customer segmentation that identifies previously unknown high-value groups
- Automated A/B testing of headlines, email subject lines, and ad copy
- Personalized customer journey mapping based on behavior patterns

Customer Service Applications:

- AI knowledge assistants that support human agents in real-time
- Intelligent self-service systems that guide customers through complex processes
- Voice of customer analysis that identifies patterns across feedback channels
- Proactive issue identification and resolution before customers complain

Operations Applications:

- Quality control systems that identify defects humans might miss
- Knowledge management systems that capture and distribute expertise
- Predictive resource allocation for staffing, inventory, or equipment
- Process automation for routine approval workflows and documentation

Finance Applications:

- Anomaly detection for identifying potential fraud or errors
- Automated categorization and processing of financial documents
- Forecasting systems that improve budget accuracy
- Spend analysis to identify cost-saving opportunities

Remember to apply what we covered in the previous parts: align these with your business KPIs, build processes around them, implement with a phased approach, and ensure they support your overall strategy. Speaking of a phased approach, use this 30-60-90 day plan to focus your AI integration.

Your 30-60-90 Day Plan

First 30 Days: Assessment

- Review business KPIs and pain points
- Complete value and feasibility assessment
- Document relevant baselines

Days 31-60: Planning

- Design your implementation approach using the 5P framework
- Identify champions and address potential resistance
- Create your measurement plan

Days 61-90: Implementation

- Execute your pilot
- Collect measurements and feedback
- Document lessons learned

If you've done the work from the previous four parts, you can likely do this faster than the 90-day timeline. And that's the not-so-secret secret. Gathering your requirements and data up front will save you oodles of time and headaches with execution.

The Bottom Line

AI in business is only valuable when it solves specific business problems. Successful organizations identify high-value opportunities, implement focused solutions, measure results, and expand based on what works.

Start small, be strategic, measure everything, and focus on business impact. That's the difference between wasting money on tools you're "still figuring out" and generating measurable value.

What business challenge will you tackle first with AI?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

May 14, 2025: Strengthening Your Foundation

I was taking a strength class over the weekend where the instructor kept emphasizing one key point: your foundation is always supporting you. For example, even when you think you're just working your arms, your core and legs are quietly doing the heavy lifting. Neglect that foundation (aka skipping leg day) and you're setting yourself up for injury. As she explained this, I couldn't help but see the perfect parallel to what I'm always telling you about business.

It hit me that this is EXACTLY what happens in organizations when they rush to implement new technology without checking if their foundations can support it.

Yikes. What a setup for a post about the 5Ps. You're welcome.

The Foundation Isn't Sexy - But It's Essential

Let's be honest. Working on your company's foundation isn't the glamorous part of business. Nobody's rushing to LinkedIn to post about how they spent six months documenting processes or organizing their data architecture. Besides me, that is. We all want to jump to the exciting stuff—implementing AI, launching new products, and announcing big wins.

I get it. I've been there too. At my previous company, they pushed to implement a fancy new analytics platform because our competitors were using it. They were so focused on the shiny capabilities that they completely ignored our foundation. The result? We spent a fortune on a system nobody could use properly because our data was disorganized, our team lacked training, and our processes were inconsistent.

It was an expensive lesson.

How can we do better?

Using the 5Ps to Audit Your Foundation

Before you integrate any new technology (especially something as transformative as generative AI), you need to know what you're working with. This is where the 5Ps framework comes in:

1. **Purpose:** Why are you implementing this technology? What specific business problems will it solve? In my experience, many companies adopt new tech because "everyone else is doing it" rather than with clear objectives.
2. **People:** Do you have the right skills on your team? Is there a plan for training? What does this mean for your customers? Yes, you need to think about your external people, not just the internal ones.
3. **Process:** Have you documented how work gets done now? Where will the new

technology fit in? Process documentation isn't exciting, but it's where you'll catch potential issues before they become expensive problems.

4. **Platforms:** What systems do you already have? How will they integrate with new technology? That messy tech stack you've been ignoring? It's about to become very relevant.
5. **Performance:** How will you measure success? What metrics matter? Without this, you'll never know if your investment was worthwhile.

[You can get your copy of the 5P Framework here](#)

The Ongoing Work of Foundation Building

Here's something I've learned the hard way: your foundation isn't something you build once and forget about. It requires ongoing maintenance, especially as you integrate new technologies.

When we first started exploring AI at Trust Insights, we made the mistake of assuming our existing data governance would be sufficient. It wasn't. We quickly realized we needed to revisit our data quality standards, privacy protocols, and documentation practices.

So what does ongoing foundation work look like when you're integrating something like generative AI?

- Regular process audits to identify what's working and what's not
- Continuous skills development for your team (this technology moves FAST)
- Iterative improvements to your data infrastructure
- Periodic review of use cases and performance metrics
- Documentation that evolves as your implementation matures

The Cost of Skipping Foundation Work

I recently spoke with a marketing director who deployed an AI content generation tool across her team without doing any foundational work. Six months later, they had inconsistent outputs, duplicate content issues, and serious brand voice problems. The technology worked exactly as designed - but without the foundation to support it, the results were chaotic.

The cost wasn't just financial. Team morale suffered, client deliverables were delayed, and they ultimately had to pause the entire initiative to go back and do the foundational work they should have started with.

Your Action Plan

If you're considering implementing generative AI (or any new technology), here's a practical way to approach your foundational work:

1. **Start with an honest assessment:** Use the 5Ps to audit where you are today. Be brutally honest about your weaknesses.

2. **Prioritize foundation gaps:** You can't fix everything at once. Which elements of your foundation will most impact your success with the new technology?
3. **Create a foundation roadmap:** Foundation building happens alongside implementation, not before it. Map out how you will strengthen your foundation as you roll out new technology.
4. **Allocate real resources:** Foundation work requires time, budget, and attention. If you're not willing to invest in it, you might want to reconsider your technology plans.
5. **Measure foundation health:** Just like tracking business outcomes, create metrics to measure the health of your foundation over time.

Remember that strength instructor I mentioned? She reminded us that even professional athletes still do foundational exercises. The foundational work never stops—it just becomes more integrated into how you operate.

What foundational elements is your organization neglecting? Reply to this email to tell me, or join the conversation in our free Slack group, [Analytics for Marketers](#).

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

May 21, 2025: Leading With Fear Is Not Leadership

I posted about this on LinkedIn this week, but it is worth repeating and expanding upon.

[You can read the post here](#)

Leaders, Do Better.

If your goal is to instill fear in your team to get something done, you're not a leader. You're not motivating. This article outlines everything that is wrong with someone abusing their "leadership" powers.

Let's be crystal clear: telling employees to "leave pity city" or suggesting "work-life balance is your problem" isn't leadership. It's bullying. Full stop.

Leaders set the tone for the entire organization. Bad leadership isn't a new problem. In fact, it's probably as old as humans. However, what we're seeing is more entitlement to behave poorly. There is this misconception that technology will magically replace human employees, therefore we can treat people as badly as we want. Tech will pick up the slack.

Leaders who have this mindset are poorly misguided and hugely mistaken. You NEED the human teams to build and maintain the technology, to evolve it, to use it. If you've alienated your people, you no longer have a team or the tech you wanted to replace them with.

This Isn't Leadership. It's Intimidation.

What we're seeing in this article is a parade of executives who are confusing authority with leadership. Jamie Dimon's profanity-laced rants. Starbucks telling remaining employees to "step it up" after cutting 1,000 jobs. Uber changing work policies and essentially saying "deal with it."

These aren't leadership moments. They're power trips.

And I'm frankly shocked that board members and investors aren't more concerned. Because this approach is business suicide dressed up as "tough management."

When I was a product manager, I reported to a VP who led with fear. He would openly yell and scream at me and my team, all while being completely out of touch with the actual work. Many days, I left in tears, unsure of how I was going to show up the next day. But here's the thing: I was also a leader. I was responsible for my team. It was my job to protect them, advocate for them, and guide them. It wasn't a great time in my career, and it has left me somewhat traumatized. But I showed up for my team and helped them through the poor management we faced. In the end, this VP was let go, and we could all let out the breath we

had been collectively holding for years.

The Real Cost of Fear-Based Management

When you lead through intimidation:

- You kill psychological safety, which directly impacts innovation
- You create an environment where people hide problems instead of solving them
- You encourage yes-people rather than critical thinkers
- You set yourself up for massive turnover the moment the job market improves
- You damage your employer brand for years to come

That's not pragmatism. It's short-sighted and destructive.

The Leadership Gap is Showing

What's particularly troubling is that these aren't new managers who don't know better. These are seasoned executives who are choosing to throw tantrums rather than lead effectively through difficult times.

The "you should be grateful you have a job" approach is the leadership equivalent of "because I said so" parenting. It might get temporary compliance, but it destroys trust permanently.

What Real Leaders Do in Tough Times

Real leaders:

1. Are honest about challenges without being demeaning
2. Set clear expectations without resorting to threats
3. Listen to concerns even when they can't address all of them
4. Create stability during uncertainty, not additional fear
5. Remember that today's decisions affect tomorrow's culture

A Wake-Up Call

If you're a leader reading this and nodding along with these CEOs, consider this your wake-up call. The approach we're seeing is not strength—it's insecurity and poor emotional regulation masquerading as "tough leadership."

If you work under this kind of leadership, do these things: document everything, build your network, and keep in mind that this market won't last forever.

This isn't about AI or technology. Those are the excuses being used so that "leaders" can justify their terrible management.

The companies that will thrive long-term aren't the ones with the loudest, most intimidating CEOs. They're the ones where leadership creates an environment where

people want to bring their best every day—not because they’re afraid, but because they’re engaged, respected, and valued.

Even in tough times. Especially in tough times.

If you want to be infuriated like me, [here is the link to the article.](#)

Be honest. Are you leading with fear or empathy?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers.](#)

- Katie Robbert, CEO

May 28, 2025: When AI-First Goes Spectacularly Wrong: Part 1

Last week, we talked about why leading with fear doesn't make you a leader. If you missed that issue, [you can find it here](#). It seems like this trend is coming to light more and more.

Over the weekend, I read about Duolingo's spectacular communication meltdown. CEO Luis von Ahn didn't just implement a questionable AI strategy—he committed one of the most catastrophic communication failures I've seen in recent memory.

And here's the kicker: [just one week later, he was on LinkedIn doing damage control](#), walking back almost everything he'd said.

The Announcement That Broke Trust in Record Time

In late April 2025, von Ahn announced Duolingo's "AI-first" strategy with these key messages:

- Plans to "gradually stop using contractors to do work AI can handle"
- Only add new employees "if a team cannot automate more of their work"
- Evaluate employees' AI fluency in annual reviews
- AI would soon teach better than humans at greater scale

Every element sent the same message to his workforce: **You are a problem to be solved, not an asset to be leveraged.**

The response was brutal. [Users flooded social media with criticism](#), with one TikTok commenter capturing the sentiment: "mama may I have real people running the company 💔" The backlash forced Duolingo to execute a complete social media blackout.

The Inevitable Backtrack

[One week later](#), von Ahn was back on LinkedIn with completely different messaging:

"To be clear: I do not see AI as replacing what our employees do (we are in fact continuing to hire at the same speed as before). I see it as a tool to accelerate what we do, at the same or better level of quality."

This is exactly what he should have led with. The fact that he had to completely reverse course reveals a fundamental misunderstanding of change communication.

Framework 1: The ADKAR Failure

Jeff Hiatt's ADKAR model from Prosci shows us exactly why Duolingo's announcement failed. ADKAR stands for Awareness, Desire, Knowledge, Ability, and Reinforcement—the

building blocks people need for successful change.

Von Ahn's original messaging:

- **Awareness:** ✓ Everyone knew about the AI strategy
- **Desire:** ✗ Created fear, not desire for change
- **Knowledge:** ✗ No explanation of employee transitions
- **Ability:** ✗ No concrete training plans mentioned
- **Reinforcement:** ✗ Reinforced human obsolescence

Score: 1 out of 5.

His corrected LinkedIn post hit all five elements—clear human roles, AI as acceleration, partnership approach, promised workshops, and ongoing support. This should have been his opening strategy.

Framework 2: The Golden Circle Disaster

Simon Sinek's Golden Circle framework reveals another critical error. Leaders should communicate Why (purpose), then How (process), then What (outcome).

Von Ahn's Backwards Approach:

- **What:** "We're going AI-first and eliminating contractors"
- **How:** "AI can handle human work"
- **Why:** "Because AI is the future" (barely articulated)

This triggered immediate threat responses.

What He Should Have Done:

- **Why:** "Help more people learn languages while making our team's work more impactful"
- **How:** "AI handles routine tasks so experts focus on innovation and cultural nuance"
- **What:** "New tools and expanded AI-enhanced career opportunities"

Starting with Why creates excitement instead of fear.

What Every Leader Should Do Before AI Announcements

Before communicating any AI strategy, run it through both frameworks:

ADKAR Checklist:

- Does my message create awareness without fear?
- Will people desire this change?
- Am I providing clear transition knowledge?

- Are there concrete ability-building plans?
- What reinforcement am I promising? **Golden Circle Test:**
- Am I starting with Why this benefits people?
- Do I explain How we'll partner, not replace?
- Are the What outcomes exciting, not threatening?

The Real Lesson

Von Ahn's backtrack revealed he understood the right approach all along. His tragedy was leading with replacement rhetoric instead of partnership language, creating an entirely avoidable crisis.

The most damaging part? Once you've told your workforce they're replaceable, you can't just take it back with a LinkedIn post. Trust, once broken, is incredibly difficult to rebuild.

[Research shows](#) that 3 in 4 AI initiatives fail to deliver promised ROI, and AI hasn't delivered the massive productivity gains leaders promise. Yet they keep making bold proclamations to excite investors, then scrambling to reassure employees when reality hits.

The question for your organization: Are you communicating AI as a threat or as an opportunity? Because your people are listening, and they're making decisions about their future based on what they hear.

This is Part 1 of a 5-part series on AI implementation failures and how to avoid them. Next up: Why the AI hype-backtrack cycle is becoming predictable across companies—and how to avoid it entirely.

What are your thoughts on AI-first strategies?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

Sources:

- Hiatt, J. (2006). *ADKAR: A Model for Change in Business, Government and Our Community*. Prosci Learning Center Publications.
- Sinek, S. (2009). *Start With Why: How Great Leaders Inspire Everyone to Take Action*. Portfolio.

June 04, 2025: When AI-First Goes Spectacularly Wrong - Part 2

If you missed Part 1 on Duolingo's communication disaster, [you can find it here](#). This week: why this pattern keeps repeating across organizations.

Here's what struck me about Duolingo's backtrack: this wasn't a communication failure. It was an organizational behavior failure.

Klarna did the same thing. Shopify too. The pattern is so predictable now: bold AI-first announcement → employee backlash → damage control → "we never meant replacement."

But why do smart organizations keep making the same mistake? Trust Insights' 5P framework reveals the organizational dysfunction behind this cycle.

The 5P Analysis: Where Organizations Break Down

Purpose: Misaligned Incentives. The real problem isn't unclear purpose—it's competing purposes within the same organization.

CEO incentives: Impress investors, show innovation, hit cost targets

HR incentives: Retain talent, maintain morale, avoid turnover

Operations incentives: Maintain quality, meet deadlines, preserve expertise

When von Ahn announced "AI-first," he was optimizing for investor perception while ignoring the organizational reality that his business runs on human expertise. This isn't a messaging problem—it's a fundamental misalignment in how leadership measures success.

People: The Stakeholder Blindness Pattern. Organizations consistently underestimate how many stakeholders are affected by AI announcements. It's not just employees—it's:

- Contractors who suddenly feel disposable
- Customers who value human service
- Partners who rely on your expertise
- Future hires who question job security

The behavioral pattern here is classic: leaders focus on the stakeholders in the room (board, investors) while forgetting about stakeholders who aren't represented in decision-making.

Process: Announcement-Driven Strategy This is where organizational behavior gets really interesting. Companies are announcing AI strategies before they have developed AI

strategies.

Why? Because in many organizations, the announcement IS the strategy. Leadership feels pressure to appear innovative, so they commit publicly to force internal action. It's a backwards approach that creates the backtrack cycle.

The organizational psychology here is telling: when you announce first and figure out implementation later, you're essentially using external pressure to drive internal change. It rarely works.

Platform: Authority vs. Influence Confusion. Leaders think their authority means their messages will be received as intended. But organizational influence doesn't work that way.

When von Ahn used LinkedIn to announce workforce changes, he was exercising authority (I can announce our strategy) without considering influence (how people will interpret and react).

The behavioral insight: authority tells you what you CAN say, but influence determines what people WILL hear.

Performance: The Measurement Disconnect. Organizations measure what's easy to count (cost savings, automation rates) rather than what actually matters for AI success (trust levels, collaboration effectiveness, innovation capacity).

We know that most AI initiatives fail to deliver ROI, but companies keep measuring the wrong indicators. This isn't an analytics problem—it's a behavioral one. Organizations gravitate toward metrics that make them feel successful rather than metrics that predict actual success.

If you want a REAL ROI calculation worksheet, you can find one in our new AI-Readiness Marketing Strategy Kit. [Download it for free.](#)

The Organizational Psychology Behind the Pattern

Why does this cycle keep repeating? Three key behavioral factors:

Innovation Theater: Organizations feel pressure to appear cutting-edge without doing the hard work of actual innovation. Bold AI announcements serve this psychological need.

Stakeholder Myopia: Decision-makers focus on the stakeholders who validate their choices (investors, tech media) while ignoring stakeholders who might challenge them (employees, customers). **Sunk Cost Momentum:** Once a public announcement is made, organizations feel pressure to defend it rather than adapt to it, leading to doubled-down messaging that makes the backlash worse.

What This Reveals About Organizational Readiness

The companies that avoid this cycle aren't necessarily smarter—they have different organizational behaviors:

They pilot internally before announcing externally. They include affected stakeholders in strategy development. They measure trust and capability alongside efficiency.

Most importantly, they understand that AI transformation is an organizational change challenge first, and a technology challenge second.

The Real Lesson for Leaders

The hype-backtrack cycle reveals something crucial about organizational readiness for AI: if your organization can't have honest internal conversations about AI implementation, you're not ready for external announcements.

Von Ahn's backtrack suggests that Duolingo hadn't actually aligned internally on their AI approach before going public. The corrected messaging—AI as acceleration, continued hiring, human-AI partnership—should have been their internal consensus before any external communication.

The pattern keeps repeating because organizations are using public announcements to force internal alignment instead of achieving internal alignment before public communication.

Breaking the Cycle Requires Organizational Change

This isn't about better messaging. It's about better organizational behavior. Companies that successfully implement AI do the hard work of internal alignment first.

They get clear on competing incentives. They include all stakeholders in strategy development. They pilot and learn before announcing. They measure what actually predicts success.

The question isn't how to communicate AI strategy better. It's whether your organization is ready for AI transformation in the first place.

Next week in Part 3: What organizations actually lose when they eliminate human expertise (and why it creates long-term competitive vulnerabilities).

Oh! And if you want to really assess your AI readiness, [download our kit of frameworks](#).

What are your thoughts on AI-first strategies?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

June 11, 2025: When AI-First Goes Spectacularly Wrong - Part 3

If you missed Part 2 on why smart companies keep making the same AI mistakes, [you can find it here](#). This week: the hidden costs of the “replacement approach” to AI.

Most leaders focus on what they’ll save by eliminating human roles, but they never calculate what they’ll lose.

So let’s do that calculation. Here’s your SWOT analysis of what actually happens when organizations choose replacement over partnership.

Strengths Lost: The Internal Expertise Drain

Institutional Knowledge Disappears:

Those contractors Duolingo eliminated didn’t just create content—they knew what worked. They understood which lessons confused beginners, which cultural references landed, and which teaching approaches actually helped retention.

This isn’t information you can feed into an AI model. It’s pattern recognition developed over thousands of interactions with real learners. When you eliminate the people, you lose the insights that took years to develop.

Tacit Knowledge Evaporates:

The most valuable knowledge in any organization is tacit—the stuff people know but can’t easily explain. How to spot quality issues before they become problems. Which customers need extra attention. When to break the rules to get better outcomes.

AI can replicate explicit processes, but tacit knowledge lives in people’s heads and transfers through relationships. Eliminate the people, and it’s gone forever.

Innovation Capacity Shrinks:

Here’s the organizational behavior insight that leaders miss: the people doing day-to-day work are often your best source of improvement ideas. They see problems first and understand why current processes fail.

When you eliminate those roles, you don’t just lose current capabilities—you lose your ability to spot opportunities for future improvements.

Weaknesses Created: New Organizational Vulnerabilities

Quality Control Gaps:

Duolingo's remaining human reviewers are now overwhelmed trying to catch errors across dozens of language programs. The workload that was distributed among many experts is now concentrated among fewer people.

This creates bottlenecks, burnout, and gaps. Quality doesn't just maintain—it degrades as remaining staff struggle to cover expanded responsibilities.

Knowledge Transfer Breakdown:

When experienced people leave (voluntarily or involuntarily), their knowledge leaves with them. But the organizational behavior pattern is worse: remaining employees stop sharing knowledge freely when they think their job security depends on being irreplaceable.

This creates knowledge hoarding, reduces collaboration, and makes the organization more fragile.

Learning Organization Dysfunction:

Organizations learn through people. When you eliminate the people who understand both current operations and potential improvements, you break the learning loop that drives continuous improvement.

Opportunities Missed: The External Competitive Costs

Market Responsiveness Declines:

Human experts can adapt quickly to cultural shifts, trending topics, or emerging learner needs. They can create timely, relevant content that connects with current events or social movements.

AI can scale existing patterns but struggles with real-time cultural responsiveness. You miss opportunities to stay relevant and connected to your audience.

Innovation Potential Shrinks:

The most successful product innovations come from deep domain expertise combined with user empathy. People who understand both the subject matter and the audience can spot opportunities that data alone can't reveal.

Eliminate the domain experts, and you lose your capacity for breakthrough innovation.

Competitive Differentiation Erodes:

What made Duolingo special wasn't just language lessons—it was culturally aware, creating sound content created by experts who understood learning science.

As they move toward AI-generated content, they lose the differentiation that human expertise provided. They become more like their competitors, not better than them.

Threats Increased: New Competitive Vulnerabilities

Competitor Advantage Creation:

While Duolingo eliminates language experts, competitors who maintain human expertise can offer superior cultural authenticity and sophistication.

The talent Duolingo eliminated doesn't disappear—it goes to competitors, taking institutional knowledge with it.

Brand Vulnerability Amplification:

The social media backlash revealed something crucial: customers value human expertise. When users comment “mama may I have real people running the company,” they're expressing preference for human-created content.

Brands that eliminate visible human expertise become vulnerable to competitors who emphasize their human element.

Crisis Response Capacity Diminished:

The masked employee video and social media blackout revealed another hidden cost: when crisis hits, you need people who deeply understand your brand, audience, and values.

AI can't navigate nuanced reputation management or cultural sensitivity during a crisis. The people who could have managed this crisis effectively were the ones being eliminated.

Market Disruption Susceptibility:

Organizations with strong human expertise can pivot quickly when markets shift. They can identify new opportunities, adapt offerings, and respond to disruption.

Organizations that have eliminated human judgment and creativity become more rigid and less adaptable to change.

The Organizational Behavior Pattern

Here's what's really happening: leaders see AI capabilities and assume human capabilities become redundant. But they're not calculating the systemic effects on organizational learning, adaptation, and resilience.

The SWOT reveals a dangerous pattern: short-term cost savings create long-term competitive vulnerabilities that are much more expensive to address than the original human expertise would have been.

The Strategic Question

The question isn't whether AI can handle specific tasks that humans currently do. It's whether eliminating human expertise makes your organization stronger or weaker in the long term.

For most organizations, the SWOT analysis reveals that replacement approaches trade short-term savings for long-term competitive disadvantage.

The companies that thrive with AI won't be the ones that eliminate human expertise most aggressively. They'll be the ones that figure out how to amplify human capabilities while maintaining the organizational strengths that expertise provides.

Next week in Part 4: How to implement AI in ways that preserve organizational strengths while building new capabilities.

What expertise is your organization at risk of losing?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers.](#)

- Katie Robbert, CEO

June 18, 2025: How to Build AI Partnerships That Actually Work: Your Implementation Roadmap

If you missed our analysis in Parts 1-3, catch up [here](#). This week: your step-by-step roadmap to AI implementation that enhances human capability rather than replacing it.

After three parts analyzing what goes wrong, it's time to build something better. Here's your systematic approach to creating AI partnerships that make your organization stronger.

The 12-Month AI Partnership Roadmap

Based on Trust Insights' proven methodology, successful AI implementation follows a structured quarterly approach that builds organizational capability while delivering measurable results.

Quarter 1: Foundation Building

Focus: Data and Purpose Alignment Your Key Actions:

- Complete TRIPS analysis to identify high-impact use cases
- Establish clear business objectives for each AI initiative
- Conduct comprehensive data quality assessment
- Build internal AI literacy through targeted training programs

What Success Looks Like: You have a prioritized list of AI opportunities, clean baseline data, and a team that understands how AI will enhance their work rather than replace it.

Quarter 2: Partnership Development

Focus: Human-AI Collaboration Design Your Key Actions:

- Design workflows where AI handles initial tasks, humans add expertise
- Establish quality standards and review processes
- Launch pilot projects with AI advocates and skeptics
- Create feedback loops for continuous improvement

What Success Looks Like: Small teams are successfully using AI tools to become more effective, with clear processes for human oversight and enhancement.

Quarter 3: Capability Scaling

Focus: Expansion and Integration Your Key Actions:

- Scale successful pilots to broader teams
- Integrate AI tools with existing martech systems
- Develop advanced AI skills among power users
- Establish governance guidelines for AI usage

What Success Looks Like: AI is integrated into daily workflows, people see measurable improvements in their work quality, and you have clear protocols for managing AI systems.

Quarter 4: Optimization and Evolution

Focus: Performance and Future Planning Your Key Actions:

- Analyze ROI and organizational impact
- Optimize human-AI collaboration based on learnings
- Plan advanced AI capabilities for year two
- Document best practices and lessons learned

What Success Looks Like: AI has become a natural part of how your team works, with measurable business impact and excited employees who see AI as their competitive advantage.

The 5P Implementation Framework

Each quarter should address all five elements of Trust Insights' 5P framework:

- **Purpose:** Clear connection between AI capabilities and business outcomes
- **People:** Skills development, change management, and stakeholder engagement
- **Process:** Workflow design, governance, and continuous improvement
- **Platform:** Technology selection, integration, and infrastructure
- **Performance:** Measurement, optimization, and ROI validation

Your 30-Day Quick Start

Want to begin immediately? Here's your first month:

- **Days 1-7:** Define your AI partnership value proposition using the Goal Alignment Worksheet
- **Days 8-14:** Identify AI champions and conduct TRIPS scoring for potential use cases
- **Days 15-21:** Design your first human-AI workflow with willing team members
- **Days 22-30:** Launch pilot project and establish measurement framework

Building Sustainable AI Partnerships

The goal isn't just AI adoption—it's creating teams where humans and AI make each other better.

Successful partnerships look like:

- Content teams using AI for research and drafts, then adding cultural expertise and strategic insight
- Sales teams leveraging AI for data analysis while focusing human time on relationship building
- Customer service using AI for information gathering while humans handle complex problem-solving
- Marketing teams deploying AI for campaign optimization while humans drive creative strategy

The mindset shift: From "Can AI do this task?" to "How can AI help our people do this task better?"

Warning Signs vs. Success Signals

You're building it wrong if:

- People are worried about job security
- Quality is declining despite automation
- AI decisions can't be explained or reviewed
- Teams are working around AI tools instead of with them

You're building it right when: - People are excited to try new AI capabilities - Work quality improves alongside efficiency - Domain experts are teaching AI systems - Innovation increases because routine work is streamlined

Get the Complete Implementation Framework

This roadmap overview gives you the strategic approach, but successful implementation requires detailed templates, checklists, and frameworks.

Download our complete [AI-Ready Marketing Strategy Kit](#) for:

- Detailed quarterly planning templates
- TRIPS scoring worksheets for opportunity assessment
- 5P implementation checklists
- ROI calculation frameworks
- Vendor evaluation criteria
- Performance tracking templates

The kit provides everything you need to move from AI confusion to AI confidence.

Your First Step

Don't wait for perfect conditions. Start with one small AI partnership this week:

- Choose a willing team member
- Identify one routine task that could benefit from AI assistance
- Design a simple workflow where AI provides input and humans add value
- Measure both efficiency and quality improvements

The companies that master AI won't be the ones with the most sophisticated technology. They'll be the ones that figure out how to make their people more capable, creative, and valuable.

Your organization can be the example others follow instead of the cautionary tale they avoid.

Next week in Part 5: Putting it all together - the organizational behaviors that separate AI success stories from AI disasters.

What is your first AI partnership going to be?

Reply to this email to tell me, or [come join the conversation in our free Slack Group, Analytics for Marketers](#).

- Katie Robbert, CEO

June 25, 2025: The Organizational Behaviors That Separate AI Success Stories from AI Disasters

If you're just joining us, catch up on our complete analysis at trustinsights.ai/newsletter. This week: putting it all together.

After analyzing Duolingo's disaster and dozens of other AI implementations, one thing is clear: this isn't about technology at all.

It's about organizational behavior.

The companies that succeed with AI versus those that create PR disasters aren't separated by technical sophistication. They're differentiated by fundamental differences in how they approach change, communication, and human partnership.

The Behavioral Divide

Organizations that fail treat AI as a technology problem:

- Cost reduction through automation
- Innovation theater to impress investors
- Communication emphasizing what's changing
- Measuring what's easy to count

Organizations that succeed treat AI as an organizational capability problem:

- Value creation through partnership
- Systematic change management to empower people
- Communication emphasizing what's improving
- Measuring what actually predicts success

The Five Behaviors That Predict AI Success

1. Purpose-Driven Implementation (Not Innovation Theater)

Failures: Announce bold AI strategies, then figure out implementation later.

Success: Start with specific problems, validate through pilots, communicate proven results.

Von Ahn's "AI-first" announcement was pure theater. His corrected messaging about "acceleration" and "workshops" represented actual purpose, but came too late.

2. Partnership-Minded Leadership (Not Replacement-Focused)

Failures: View AI and humans as interchangeable, measure success by eliminated roles.

Success: Design workflows where both make each other better, measure enhanced capability.

Our SWOT analysis revealed what replacement costs: institutional knowledge, innovation capacity, crisis resilience. Smart organizations preserve these while adding AI capabilities.

3. Trust-Building Communication (Not Fear-Inducing Announcements)

Failures: Sound exciting to investors but threatening to employees, then backtrack.

Success: Use ADKAR and Golden Circle principles to communicate opportunity with concrete support.

Duolingo violated every change management principle. Trust, once broken, is nearly impossible to rebuild.

4. Systems Thinking (Not Announcement-Driven Strategy)

Failures: Use public announcements to force internal alignment.

Success: Achieve consensus internally first, then communicate from proven results.

The best implementations follow systematic approaches like our 12-month roadmap, building capability quarter by quarter.

5. Human-Centered Measurement (Not Just Efficiency Metrics)

Failures: Track automation rates while ignoring trust and innovation capacity.

Success: Measure engagement, quality, and capability enhancement alongside efficiency.

The Alternative Duolingo Story

Imagine if von Ahn had demonstrated these behaviors:

Instead of: "Going AI-first and eliminating contractors" **He could have said:** "Giving our experts AI tools to create more authentic content faster, so they focus on cultural elements that make learning stick."

Instead of: AI performance requirements **He could have:** Provided training and experimentation time to help everyone enhance their expertise.

Same AI capabilities, completely different organizational outcome.

Your Success Framework

Before any AI announcement:

- Have we proven this through internal pilots?
- Will people see enhancement or threat?
- Do we have concrete support plans?
- Are we measuring human outcomes?

During implementation, cultivate:

- Partnership mindset over replacement thinking
- Trust-building over innovation theater
- Internal alignment before external announcements
- Human-centered measurement alongside technical metrics

The Choice Every Leader Faces

Technology doesn't determine AI success—organizational behavior does.

Every leader faces the same choice: Use AI to build capability or justify eliminating people? Invest in partnership or pursue replacement? Enhance human potential or automate it away?

Companies that choose partnership will have massive competitive advantages. Those that choose replacement will create their own disasters.

Your Next Step

You have everything needed to build success:

- Communication frameworks that build trust
- Analysis tools to spot dysfunction early
- Assessment methods for what to preserve vs. enhance
- Implementation roadmap for sustainable partnerships
- Behavioral guidelines for strengthening your organization

The question isn't whether AI will transform your workplace. It's whether you'll use that transformation to make your organization stronger and more resilient, or follow the path to social media blackouts and embarrassing backtracks.

Choose partnership.

Download our complete [AI-Ready Marketing Strategy Kit](#) for detailed frameworks that turn these insights into action.

What organizational behavior will you focus on first?

Reply to this email to tell me, or [come join the conversation in our free Slack Group](#),

[Analytics for Marketers.](#)

- Katie Robbert, CEO

July 02, 2025: Keep it Simple, Keep it Fun: Your Last-Minute Guide to a Flawless 4th of July BBQ

No hard sell this week. No lessons about building a foundation before introducing new tech. No 5Ps. This week is a big vacation week in the United States, so let's keep it light. Enjoy your break if you're fortunate enough to take one this week.

With the Fourth of July upon us, many of you are kicking back, relaxing, and enjoying a well-deserved vacation. The last thing you need is a complicated to-do list for your holiday cookout.

The Only BBQ Tips You Actually Need

Keep it stupid simple. You don't need 47 different dishes. Get good burgers, decent hot dogs, maybe a pasta salad that doesn't come from a box. Done. Fruit if you're feeling fancy.

Prep the night before or suffer. Chop stuff, make burger patties, check lists. Future you will either thank present you or curse your name—your choice.

Check your grill. Nothing kills a party faster than a cold grill and having to frantically call neighbors asking if they have charcoal.

Get more ice. More than you need. It melts fast, and warm drinks on a hot day are a bummer.

Three Recipes That Won't Stress You Out

Easy Peasy Burgers

Get 80/20 ground beef. Add salt, pepper, garlic powder. Form patties. Don't overthink it. Grill 4-5 minutes per side. Set up a toppings bar so people stop asking you to customize their order.

Caprese Pasta Salad

AKA "Looks Fancy But Takes 10 Minutes." Cook pasta, drain, and let cool. Add cherry tomatoes, mozzarella balls, basil, and balsamic dressing. Toss. Refrigerate. Watch people assume you're some kind of culinary genius.

Grilled Watermelon

Cut watermelon into thick slices. Brush with olive oil. Grill 2-3 minutes per side. Drizzle with

honey if you're feeling fancy. It's weird, it's delicious, and everyone will ask for the "recipe."

Look, your guests won't remember if the napkins matched the tablecloth. They'll remember if you were stressed out the whole time or if you actually hung out and had fun with them.

Happy 4th, everyone! Try not to set anything on fire (except the grill).

We're taking time this week to reset and plan ahead. Stay tuned for some great new content, courses, and offerings in Q3!

In the meantime, feel free to join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

July 09, 2025: Are We Cheating When We Use Generative AI?

Last month, I was deep in the weeds developing our AI-Ready Marketing Strategy Kit - you know, the one we just released. I'd spent months researching, years developing frameworks, and weeks pulling together everything I know about building marketing strategies that actually work in an AI-driven world. The TRIPS framework, the 5Ps, the 6Cs - it was all swimming around in my head in various stages of completion.

I had all these pieces of expertise, but I was struggling to put them together in a way that felt coherent and actionable. And then I did something that made my stomach twist with guilt.

I opened Claude.

Not to create the frameworks for me (those came from decades of experience and research), but to help me organize my thoughts and see how all these pieces fit together into a logical flow. And you know what happened? I felt like I was cheating. Like I was somehow less of a professional because I used an AI tool to help me structure what I already knew.

Turns out I'm not alone in this feeling.

The Great AI Shame Spiral

When Chris and I recorded our podcast episode about generative AI this week, we also asked our Analytics for Marketers community about the stigmas they're seeing around AI use. The responses? *Chef's kiss* - and way more nuanced than I expected.

The Academic Hangover Chuck A. nailed something I hadn't even considered: "Noticing some younger folks (especially graduated college within last 3 years) have negative associations with using at work after 4 years of college where there was a lot of negativity on AI (Eg, 'Cheat with AI and you could get kicked out of school')."

Oof. No wonder we're all feeling guilty. An entire generation was literally taught that using AI = academic dishonesty.

The Pressure Cooker Problem But then there's the flip side. Chalsea-Blaze pointed out: "One stigma I see is that if you're not using generative AI, you're falling behind or resisting progress. But I think there's still a healthy space for skepticism and thoughtful adoption."

And Stephanie S. added: "One stigma I see is if you don't accept the company's ChatGPT-

plus invitation right away it's perceived that you're resistant to change."

Wait, so we're damned if we do and damned if we don't?

Here's What Actually Happened When I Built That Strategy Kit

When I used AI for that strategy kit, here's what I *didn't* do:

- Skip the research
- Let AI create the frameworks
- Avoid developing my own methodologies
- Stop thinking critically about the strategy components

Here's what I *actually* did:

- Used deep research to better understand marketing strategy best practices
- Expanded the TRIPS, 5Ps, and 6Cs frameworks based on my expertise
- Identified gaps where additional strategic elements were needed
- Used AI to help me see how all these pieces connected logically
- Refined, tested, and validated every framework and process

The AI saved me time in seeing the big picture, not in building the expertise.

Turns out, that's exactly how Joy S. uses it too: "I typically only (actively) use AI to reorganize my writing or thoughts when I need to see it differently, or when I don't like what I've come up with and want a different presentation."

The "Other Set of Eyes" Revelation

Lisa K. absolutely nailed it with this perspective: "In college, among my group of friends, we would all read and proofread each other's work because you need more than one set of eyes. I work from home alone. AI is my other set of eyes."

She also shared something that made me feel so much better about my own AI use: "And Claude has done a great job of rewriting my direct, American emails into a format appropriate for the culture of my Indonesian coworkers... I am still learning and will probably never fully grasp the nuances of Indonesian business culture, and I greatly appreciate the help."

This is the reframe we all need: AI as a collaborator, not a replacement.

As Tony L. put it: "The biggest stigma I see is getting people to treat AI like a junior staffer. In my work with nonprofits, I've found AI is most effective when I approach it as a collaborator, someone who needs context and direction to get the job done right."

The Real Problems We're Not Talking About

While we're all worried about whether we're "cheating," there are some bigger issues

bubbling up:

The Solution-in-Search-of-a-Problem Issue: Todd B. hit this one hard: “It’s often a solution in search of a problem.” And honestly? He’s not wrong. Not every task needs AI intervention.

The Environmental Concern: Joy S. brought up something I hadn’t considered enough: “I have a real problem with its impact on the planet, so I feel that it is used waaaaay more broadly than it needs to be.”

The Job Security Reality: Tony L. observed: “In smaller nonprofits, there’s real anxiety about job security. For many, the hesitation isn’t just about workflow changes, it’s about wondering if AI makes their work less unique or even obsolete.”

And Todd B. delivered the gut punch: “The challenge will be that, given the choice between doing your job better and doing a worse job at a lower cost, businesses will often choose the latter.”

Here’s My Mind Shift for AI Use

Instead of asking “Am I cheating?” let’s start asking these questions:

1. **Am I still the expert in the room?** If you’re using your knowledge to guide, validate, and improve the AI output, you’re not cheating.
2. **Am I solving a real problem?** Using AI to reorganize thoughts or format content? Great. Using it just because it exists? Maybe not.
3. **Would I stake my reputation on this output?** If you’re comfortable putting your name on it after review and refinement, you’re probably using AI appropriately.
4. **Am I being honest about the value exchange?** AI helps with process efficiency, but the strategic thinking and expertise are still yours.

What I’m Doing Differently Now

1. **I’m using AI for the organizational stuff** – seeing connections, structuring complex ideas, reformatting
2. **I’m keeping the strategic thinking** – framework development, methodology creation, real-world applications
3. **I’m being selective** – not every task needs AI; sometimes the manual process is actually better
4. **I’m setting boundaries** – AI helps with process, but doesn’t replace my professional judgment

It boils down to this. I’m using generative AI to cover my blindspots. We could all use that kind of support, right?

Because honestly? We’ve got bigger problems to solve than feeling bad about using tools that make us more efficient *when used thoughtfully*. Let’s focus that energy on doing better

work instead.

P.S. - Yes, I used AI to help organize some of the thoughts in this post. And no, I don't feel guilty about it anymore. But I also didn't use it for everything. Progress.

What stigmas are you seeing or feeling around AI use? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

July 16, 2025: AI Beefs: What's Really Grinding Our Gears

So there I was last week, sitting at my desk working on slides for our AI Kit course, and I thought, "You know what would be smart? Let me use AI to help create these slides about AI."

Oh. The irony.

Three hours later, after crafting increasingly specific prompts, tweaking outputs, and essentially describing exactly what I wanted in excruciating detail, I realized something: I could have just made the damn slides myself in half the time. The amount of work that goes into prompting a system to make what I want is sometimes equal to just doing the work myself.

And that got me thinking about all the other ways AI frustrates us. Last week we talked about AI stigmas, and the response was incredible - so many people felt seen and heard. So this week, I asked our community on Slack and LinkedIn about their biggest "beef" with AI. This isn't about solutions (though we'll get there in future posts). This is about letting people air their grievances and realize they're not alone in this era of "AI everything."

The "It's Making Us Dumber" Beef

Hannah S. hit on something that I think a lot of us feel but don't always voice: *"I feel responsible to myself to not be lazy and outsource all my thinking to AI. Might just be me being paranoid, but I don't want to get dementia when I'm 50. Gotta workout my brain."*

Hannah, you're not alone. There's this weird guilt that comes with using AI - like we're somehow cheating or taking the easy way out. Shane C. echoed this sentiment: *"I don't want AI thinking for me. I have a small business and I feel like I need to be the differentiator, which means my ideas are that differentiator."*

Here's what I find interesting: both Hannah and Shane aren't anti-AI. They're pro-human brain. There's a difference.

The "It's Not Actually Smart" Beef

Todd B. called out one of my biggest pet peeves: *"My biggest one is people thinking it's actually AI (specifically LLMs) and thinking it actually thinks."*

Joy S. had the perfect analogy: *"My husband says it's the new high definition. Everybody used to say things were HD that weren't actually HD. It's the same now with AI."*

This drives me up the wall too. When people treat LLMs like they're sentient beings making conscious decisions, it creates unrealistic expectations. Which brings us to...

The "Why Are You Like This?" Beef

Kelsey R. perfectly captured the frustration of AI's confidence in its own wrongness: *"when it gives me a very stupid wrong answer, or didn't actually research what I needed it to. So I say 'that's not fully true' and it goes YOU'RE RIGHT!. Like thanks, Chevin (ChatGPT and Kevin). I know that."*

Chevin. I'm dead.

This ties into what Tris mentioned about *"inconsistent behavior and outputs from a Gem GPT with the same inputs."* Lisa K. expanded on this: *"even if you use the same AI every time, every time you tweak that prompt, it gives you an answer that essentially takes a totally different train of thought than the first time."*

The "Human Problems, Not AI Problems" Beef

Christopher P. summed it up in the way only he can: *"I have no beefs with AI, just beefs with the stupid humans who make it."*

Leslie dove deeper into this: *"My AI beefs center around bias trained into the model(s) and the absolutely careless (and ubiquitous) deployment of AI everywhere with no way to delete it or opt out. Both of which are human problems, like Chris said, not AI problems."*

Joy S. mentioned environmental impacts and *"people who use it to just play around without thinking about those impacts."* Again, human problems.

The "Corporate Replacement Fantasy" Beef

Sunny H. went full ranty pants mode (and I love her for it): *"Companies who think that AI can replace critical thinking, creativity, or people (especially in situations where a human touch is make or break - like customer success or support)."*

Jess H. felt this one hard: *"AI support chatbots are driving me NUTS lately!! YES I looked through your help articles, no I don't need you to send them to me."*

We've all been there. Trapped in bot hell when we just need to talk to a human who can actually solve our problem.

The "Mirror, Mirror" Beef

Pancho C. had perhaps the most honest response: *"my complaint is not so much about AI but wish it would read my empty mind... I hate how AI can become a mirror showing and*

reflecting myself."

Ouch. That one hit different.

He's talking about how AI exposes our own lazy thinking - when we expect it to magically know what we want without us doing the work to clearly communicate it. It's like holding up a mirror to our own unclear expectations.

The "Everything Is Falling Apart" Beef

Michael B. brought up the sustainability question: *"AI is shaping up to be the next internet bubble but the hype is so loud no one's hearing the voices of reason."*

Koreen P. added: *"Companies think AI will solve their data problems, but it will only make them worse."*

These aren't just technical concerns - they're pointing to a fundamental misunderstanding of what AI can and can't do.

What This All Means

Reading through these responses, I'm struck by how many of these "AI beefs" are really human beefs. We're frustrated by:

- Our own lazy thinking
- Companies making bad decisions about AI implementation
- The gap between AI hype and reality
- Our tendency to anthropomorphize technology
- The lack of clear communication about what AI actually is

The most honest among us (like Pancho) admit that AI often serves as an uncomfortable mirror, reflecting back our own unclear thinking and unrealistic expectations.

The Bottom Line

Your AI frustrations are valid. You're not alone in feeling like the emperor has no clothes sometimes. The technology itself isn't the enemy - it's how we're thinking about it, implementing it, and using it that's creating these problems.

And you know what? That's actually good news. Because human problems have human solutions. More on that in the coming weeks!

What's your biggest AI beef? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

July 23, 2025: Using AI for KPIs

A reader recently asked us: “How might you use AI in the process of evaluating KPI performance and next actions?”

This is exactly the kind of pattern recognition that AI was built for. But here’s the thing: just throwing AI at your KPI problems won’t magically solve them. You need a framework.

Enter the 5P Framework. It’s what I use to tackle any analytics challenge, and it works perfectly for incorporating AI into your KPI evaluation process. Let me walk you through how this actually works.

Purpose: What Problem Are We Actually Solving?

Before we get excited about AI doing all the heavy lifting, we need to be crystal clear about what we’re trying to accomplish.

Most people say they want to “improve KPI performance,” but that’s not where you should start. Here are the real questions we should be asking:

- Which metrics actually impact our business goals?
- What patterns in our data are we missing?
- How quickly do we need to identify and respond to performance changes?
- What decisions will we make differently based on better KPI analysis?

The AI Connection: AI excels at answering specific questions, but it’s terrible at figuring out what questions to ask. That’s still our job.

For example, instead of asking AI to “analyze my KPIs,” ask: “What factors correlate with our highest-converting traffic, and how can I identify those patterns earlier?”

People: Who Actually Cares About This Output?

This is where most KPI initiatives fall apart. We create beautiful dashboards that nobody looks at because we didn’t think about who needs what information and when.

Internal Stakeholders:

- Marketing team: Needs to understand traffic quality and source performance
- Sales team: Wants to know which leads are most likely to convert
- Executive team: Requires high-level trends and alerts for major changes
- Operations team: Needs operational metrics that impact customer experience

External Considerations:

- Customers whose behavior creates the data
- Partners or vendors whose performance affects your metrics
- Regulatory requirements for certain industries

The AI Advantage: AI can personalize insights for different stakeholders. Instead of one generic dashboard, AI can generate role-specific reports and alerts.

Your CMO doesn't need to know that mobile page load time increased by 0.3 seconds. But they do need to know that mobile conversion rates dropped 5% and it might be related to site performance.

Process: Making This Repeatable and Consistent

Here's where the magic happens. A good process turns chaotic data wrestling into systematic insight generation.

Traditional KPI Review Process (probably sounds familiar):

1. Pull reports from multiple tools every Monday
2. Copy numbers into master spreadsheet
3. Calculate month-over-month changes manually
4. Send summary email with green/red status indicators
5. Panic when something's red
6. Schedule emergency meeting to figure out what happened

AI-Enhanced Process:

Weekly Automated Analysis:

- AI pulls data from all connected sources
- Identifies statistically significant changes
- Correlates changes across different metric categories
- Generates narrative summaries for each stakeholder group

Exception-Based Reporting:

- Continuous monitoring for unusual patterns
- Automated alerts only when action is needed
- Context-rich notifications that include potential causes

Let me show you this with a real example using e-commerce KPIs:

Sample KPI Map: E-commerce Performance

- **Traffic Metrics:** Sessions, users, traffic sources, mobile vs desktop
- **Engagement Metrics:** Pages per session, time on site, bounce rate
- **Cart Metrics:** Add-to-cart rate, cart abandonment rate, average cart value
- **Conversion Metrics:** Purchase rate, revenue per visitor, customer acquisition cost

Traditional Analysis: Look at each metric separately and manually try to find connections.

AI-Enhanced Process:

1. AI analyzes all metrics simultaneously every day
2. Identifies that cart abandonment spiked 15% yesterday

3. Correlates this with increased mobile traffic from a specific campaign
4. Discovers mobile checkout process has a technical issue
5. Alerts appropriate team with specific action items
6. Continues monitoring to confirm fix effectiveness

The process becomes: Monitor → Detect → Correlate → Alert → Act → Verify.

Platform: What Tools Do We Actually Need?

You don't need to completely overhaul your tech stack to get started with AI-enhanced KPI analysis. Let's be realistic about what's actually required. You probably have all these tools already.

Minimum Viable Platform:

- Your current analytics tools (Google Analytics, whatever CRM you're using, etc.)
- A way to export data (CSV files work fine to start)
- Access to AI tools like ChatGPT, Claude, or Google Analytics Intelligence
- A shared location for insights and actions (could be as simple as a shared document)

Intermediate Platform:

- Automated data connections (Zapier, webhooks, or native integrations)
- Dashboard tools with AI features (Tableau, Power BI, or specialized analytics platforms)
- Automated alerting systems
- Centralized reporting location

Advanced Platform:

- Custom AI models trained on your specific data
- Real-time streaming analytics
- Predictive modeling capabilities
- Integrated action-taking (automated bid adjustments, inventory reordering, etc.)

Start Simple: Most businesses should start with the minimum viable platform. Export your KPIs to a CSV, upload it to ChatGPT, and ask: "What patterns do you see in this data that I should investigate?"

Performance: Are We Actually Solving the Problem?

This is the P that everyone skips, and it's why most KPI initiatives fail. We never go back and check if our new AI-enhanced process is actually working.

How to Measure Success:

Speed to Insight: How quickly can you identify and understand changes in performance?

- Before AI: Took 3-5 days to notice and investigate a conversion rate drop

- After AI: Alert within hours, root cause analysis within a day

Decision Quality: Are you making better business decisions?

- Track decisions made based on KPI insights
- Measure outcomes of those decisions
- Compare to decisions made with old process

Time Investment: Are you spending time on analysis or action?

- Before: 6 hours/week wrestling with data, 2 hours taking action
- After: 2 hours/week reviewing AI insights, 6 hours implementing improvements

Stakeholder Satisfaction: Are people actually using the insights?

- Survey your internal stakeholders quarterly
- Track dashboard usage and alert response rates
- Measure time from insight to action

Your 5P Implementation Blueprint

Ready to put this into practice? This is your reusable blueprint. Work through each step at your own pace—some organizations can knock this out in a few weeks, others need a couple months. The key is being thorough at each step.

Step 1: Define Your Purpose

- Write down the top 3 business questions your KPIs should help you answer
- Be specific: instead of “improve conversion,” try “identify which traffic sources produce customers with highest lifetime value”
- Test each question by asking: “What would I do differently if I knew the answer?”

Step 2: Map Your People

- List everyone who currently receives KPI reports or who should be making decisions based on the data
- Interview 2-3 key stakeholders about what insights they actually need and how they would use them
- Document what each person cares about most and how often they need updates

Step 3: Design Your Process

- Map your current KPI review process from data collection to action taking
- Identify the biggest time-wasters and pain points (usually manual data copying and correlation hunting)
- Design your ideal process: what would automated pattern recognition and alerting look like?

Step 4: Choose Your Platform

- Start simple: CSV exports + AI tools like ChatGPT or Claude for pattern analysis
- Identify your next evolution: automated data connections, specialized analytics platforms, or custom solutions
- Don't over-engineer—pick tools that solve your current problems, not theoretical

future ones

Step 5: Measure Performance

- Set baseline measurements before implementing AI: how long does insight generation take? How quickly do you act on findings?
- Define success metrics: speed to insight, decision quality, stakeholder satisfaction, time allocation
- Build in regular check-ins to assess whether the new process is actually working

Step 6: Implement and Iterate

- Start with one set of connected KPIs (like the e-commerce example above)
- Test your new process for at least a full business cycle before making major changes
- Refine based on what you learn, then expand to additional KPI sets

The Reality Check

AI isn't going to turn you into a data analytics expert overnight. But if you approach it systematically using the 5Ps, it can absolutely help you spend less time drowning in dashboards and more time taking action.

The goal isn't to automate everything—it's to automate the repetitive things so you can focus on the interesting decisions that actually move your business forward.

To the reader who sparked this post: I hope this gives you a concrete framework for incorporating AI into your KPI evaluation process. Start with Purpose—get clear on what questions you're really trying to answer. Everything else will follow from there.

[Grab your copy of the 5P Framework!](#)

Which P feels like your biggest challenge right now? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

July 30, 2025: Where to Start with AI Integration

Last month, I watched a friend's team spend three weeks trying to connect their new lead scoring LLM to their existing CRM system. What should have been a straightforward integration turned into a technical nightmare because they skipped the fundamentals.

This week's reader question hit on exactly this pain point: **"What is the best way to integrate different software systems with AI?"**

Here's what most people get wrong: they jump straight into the technology without understanding what they're working with. It's like renovating your kitchen without knowing where the plumbing runs—you'll end up with expensive surprises. What's not a surprise? What I'm about to tell you.

The 5P Framework for Integration Success

I've found the most reliable approach is working systematically through five key areas before you start connecting anything:

Purpose: Get specific about the business problem you're solving. Not "we want to use AI" but "we need to eliminate 3 hours of daily manual data entry between our CRM and email platform." Use this clarity to prioritize which integrations actually matter.

People: Identify who owns each system, who will champion the integration, and who needs training. Most integrations fail here—great technology with unprepared people equals expensive shelf-ware.

Process: Map your current workflows visually. Where does data flow now? What manual steps exist? Then design how it should work with AI. Establish governance rules upfront: who approves changes, how do you test, and what happens when things break?

Platform: Choose integration tools your team can actually maintain. Sometimes Zapier beats enterprise solutions if your team can manage it long-term. Focus on reliability over flashiness.

Performance: Track both technical metrics (uptime, error rates) and business impact (time saved, ROI). Set up monthly reviews to catch problems early and optimize continuously.

Start Small, Build Confidence

Pick one integration that solves a real pain point for your team. Work through the 5Ps systematically. Document what you learn. Build on that success for more complex projects.

The key is creating a foundation that your team can actually maintain, not just implement

once.

Where to Go Deeper

If you want the complete playbook with worksheets, checklists, and templates for each step, the AI-Ready Marketing Strategy Kit walks through this entire process in detail. It includes prioritization frameworks, readiness assessments, vendor evaluation questions, and performance tracking templates—all the practical tools that turn this framework into action.

[Get your copy of the AI-Ready Marketing Strategy Kit here.](#)

[And if you already have the Kit and just want someone to do it for you, give us a shout!](#)

But honestly? Just working through the 5Ps on paper will reveal most of what you need to know about your next integration steps.

What's the one manual process between your systems that drives your team crazy? That's probably where you should start.

Reply to this email or join our free Slack group, [Analytics for Marketers.](#)

- Katie Robbert, CEO

August 06, 2025: Why Being a T-Shaped Person Matters More Than Ever

Last week marked exactly 10 years since I started working with Chris. *Ten years*. Yikes, where does the time go?

I remember being intimidated by pretty much everything in those early days. I was coming from this weird academic-wannabe-commercial space where I understood theory but had zero practical experience in the real business world. Terms that everyone else threw around casually? Completely foreign to me. And one of my first responsibilities was writing for the company blog on a regular basis.

As the person responsible for the output, Chris's standards for what was "acceptable" for the company blog were really high. I was about a decade out of practice for writing anything original other than a project plan. The ironic part? I'd always wanted to write. In undergrad, I took every writing class I could get my hands on and absolutely loved the process. But once I started working full-time, those opportunities disappeared. Until I landed at the agency.

All of a sudden, my opinion mattered. I needed to have something to say.

So here I am, 10 years later, wanting to revisit one of my very first posts: the idea of a T-shaped person. The original post has long since disappeared from that company's website (lesson learned about keeping offline copies of your work!), so I'm working mostly from memory here.

What I Thought I Knew About T-Shaped People

Back then, I probably wrote something along the lines of: "A T-shaped person is well-rounded in a lot of areas and deeply focused in one or two."

Classic textbook definition, right? The horizontal stroke of the T represents broad knowledge across multiple disciplines, while the vertical stroke represents deep expertise in a specific area.

It turns out, I wasn't wrong. But I wasn't thinking big enough.

Why the Stakes Are Higher Now

Here's what's changed in the past decade: our industry has evolved dramatically, and the biggest shift is that being well-rounded isn't just nice to have anymore - it's absolutely crucial for survival.

With AI dominating conversations, tasks, processes, and the overall job market, flexibility has become your most valuable asset. You can't just be the "social media person" or the "analytics person" anymore. Those narrowly defined roles are exactly what AI is coming for first.

The New T-Shaped Definition

If I had to redefine what it means to be T-shaped in 2025, here's how I would break it down:

- **The vertical stroke (your deep expertise):** Critical thinking
- **The horizontal stroke (your broad knowledge):** Understanding all the areas that comprise a business

Let me explain why this matters.

Critical Thinking as Your Superpower

AI can generate content, analyze data, and even write code. But it can't think critically about whether the output makes sense in your specific context. It can't question assumptions, identify blind spots, or make judgment calls based on nuance and experience.

Critical thinking means:

- Asking "why" and "what if" instead of just accepting information
- Connecting dots across seemingly unrelated data points
- Identifying patterns and anomalies that others miss
- Making strategic decisions when you don't have complete information

This is your insurance policy against automation.

Business Literacy as Your Foundation

The horizontal stroke isn't about being mediocre at everything - it's about understanding how all the pieces fit together. You need to grasp:

- How marketing impacts sales (and vice versa)
- Why legal considerations affect creative decisions
- How customer service insights inform product development
- Why financial constraints shape strategic priorities

When you understand the whole business ecosystem, you become the person who can translate between departments, spot opportunities, and solve problems that span multiple functions.

What This Looks Like in Practice

I've watched this play out countless times over the past decade. The people who thrive aren't necessarily the most technically skilled in their specific area. They're the ones who can:

- Take a data analysis and explain what it means for the sales team

- Look at a marketing campaign and immediately spot potential operational challenges
- Understand why a “simple” website change requires input from five different departments
- See connections between customer complaints and product roadmap decisions

These are the people who become indispensable - not because they're irreplaceable in their technical skills, but because they're irreplaceable in their ability to think across the entire business.

Your Action Plan

So how do you become (or stay) T-shaped in this new reality?

1. **Strengthen your critical thinking muscle:** Question everything. When someone presents data or makes a recommendation, dig deeper. What assumptions are we making? What aren't we considering?
2. **Get curious about other departments:** Sit in on sales calls. Read customer service tickets. Attend finance meetings. Ask questions about how other teams measure success.
3. **Practice translation:** When you're in cross-functional meetings, make it your job to help different departments understand each other. Become the bridge.
4. **Stay learning:** Not just about your specific area, but about business in general. Read about industries outside your own. Understand macro trends that could impact your company.

The beautiful thing about this approach? The more you understand about how businesses work, the better you become at your own specialized area. It's not about spreading yourself thin—it's about giving yourself context that makes your expertise more valuable.

And honestly? It makes work much more interesting when you understand how all the pieces connect.

What does being T-shaped look like in your role? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

August 13, 2025: Why “Soft Skills” Aren’t Soft

Here’s a story that perfectly illustrates a much bigger problem we need to talk about. We recently had an incident where a generative AI model made a telling decision: it assumed that my content about strategy and “soft skills” was less important than Chris’s more technical content, and prioritized his work accordingly. This wasn’t just a technical glitch – it was a reflection of deeply embedded bias about what kind of work and expertise gets valued.

If you want the full details on this troubling example of AI bias, [check out this week’s podcast episode](#).

But here’s what really got me thinking: When exactly did “soft skills” become synonymous with “unimportant”?

Let’s be honest here – calling them “soft” is probably the first problem. It’s like we’ve collectively decided that anything involving human connection, communication, or strategic thinking is somehow less valuable than knowing how to code or run a financial model. And that’s just the wrong way to think about it.

The “Soft Skills” Problem

Last week I wrote about the evolved T-shaped person, and you know what sits right at the center of that model? Critical thinking. That’s supposedly a “soft skill,” but it has become more crucial than ever.

So what exactly are we talking about when we say “soft skills”? Here’s the thing – they’re not soft at all. They’re the skills that:

- Help you navigate complex human dynamics
- Enable you to communicate ideas effectively
- Allow you to think strategically about problems
- Give you the ability to adapt when everything changes (which, let’s face it, is constantly)
- Help you lead teams through uncertainty
- Enable you to ask the right questions, not just find answers

Honestly, these sound pretty essential to me. Not exactly “soft.”

Why Hard Skills Are Getting Softer (And Soft Skills Are Getting Harder)

Here’s what’s happening in our AI-everywhere world: The skills we used to consider “hard” – data analysis, coding, even some forms of writing – are increasingly being automated. Don’t get me wrong; understanding these areas is still important. But the day-to-day execution? AI is getting really good at that.

But you know what AI still struggles with?

- Understanding context and nuance
- Reading between the lines in a client conversation
- Knowing when to pivot strategy based on team dynamics
- Facilitating difficult conversations
- Building trust with stakeholders
- Making judgment calls when data is incomplete

These are the skills that separate good professionals from great ones. And they're becoming more valuable, not less.

The Real Power of "People Skills"

I've been doing this for a while now, and I can tell you that every major success I've had – every project that went smoothly, every client relationship that thrived, every team that delivered beyond expectations – it came down to the so-called soft skills.

Like the time we had a project completely derailed because of conflicting stakeholder priorities. The technical solution was straightforward, but the people problem? That required active listening, strategic communication, and the ability to find common ground. No amount of technical expertise was going to solve that one.

Or when we had to completely change direction mid-project because market conditions shifted. The team needed someone who could help them process the change, maintain morale, and think creatively about new approaches. Again, not exactly a technical problem.

What This Means for Your Career

Here's my take: If you want to future-proof your career, stop thinking of soft skills as nice-to-have add-ons. They're your competitive advantage.

Focus on developing:

1. **Critical thinking** – The ability to analyze information, question assumptions, and make reasoned decisions
2. **Communication** – Not just presenting, but truly connecting with your audience
3. **Emotional intelligence** – Understanding yourself and others to work more effectively
4. **Adaptability** – Thriving in ambiguity and changing circumstances
5. **Strategic thinking** – Seeing the bigger picture and connecting dots others miss
6. **Facilitation** – Helping groups work together effectively

And here's the kicker: These skills amplify everything else you do. They make your technical skills more valuable, your ideas more persuasive, and your impact more significant.

The Bottom Line

Maybe it's time we stop calling them "soft skills" altogether. How about "power skills"? Or "human skills"? Or just "essential skills"?

Because here's what that AI model missed when it dismissed my strategy content: In a world where machines can increasingly handle the technical stuff, the ability to think strategically, communicate effectively, and navigate complex human dynamics isn't getting less important – it's becoming the most important skill set of all.

What do you think? Have you noticed this bias against "soft skills" in your work? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

P.S. – If you're looking to develop these skills further, remember that they're just like any other capability: they improve with practice, feedback, and intentional development. Don't wait for them to magically appear. Shoot me a note if you want some help!

August 20, 2025: A Common Leadership Mistake

Earlier this year, I watched a CEO confidently tell the company at the all-hands meeting that their AI strategy was “handled” because his IT director was “looking into it.” Three weeks later, that same IT director quit, taking with him all the knowledge of what they were actually trying to build.

This reminded me of a project I completely botched early in my career. I was leading a major process overhaul and decided to “empower” my team by assigning different pieces to different departments and then stepping back to “let them do their thing.” Marketing handled the communication strategy, Operations tackled the workflow changes, and Finance managed the budget implications.

I thought I was being a great delegator. Turns out, I was just being absent.

Six weeks later, we had three beautiful solutions that didn’t work together, a confused workforce, and a budget that nobody could explain. The problem wasn’t my team (they were brilliant). The problem was that I had abdicated leadership instead of actually leading. It’s a very common leadership mistake.

Here’s the Thing About Strategic Initiatives: They Need Strategic Leadership

When you’re facing a complex challenge (whether it’s AI implementation, digital transformation, or any major change), your brain immediately starts sorting it into departmental buckets. Technology stuff goes to IT, people stuff goes to HR, money stuff goes to Finance.

But here’s what that CEO (and maybe you) are missing: **Major strategic initiatives aren’t departmental projects. They’re fundamental shifts in how your business operates.**

When you say “my [department] is looking at it,” what you’re really saying is:

- “I do not understand this well enough to lead it.”
- “Someone else can figure out how this changes our entire business model.”
- “I’m comfortable making significant decisions about things I don’t understand.”

None of these are particularly confidence-inspiring leadership positions.

What Real Strategic Leadership Actually Looks Like

Leading a major initiative doesn’t mean you need to become an expert in every technical detail (though a basic understanding wouldn’t hurt). It means you need to understand how this change will fundamentally impact:

- **Your customers’ expectations:** How will their experience change, and are you prepared for that?

- **Your competitive landscape:** What advantages or vulnerabilities does this create?
- **Your workforce:** Which roles will change, which skills will matter, and how will you help people adapt?
- **Your operations:** What processes need to evolve, and what new capabilities do you need?

This isn't stuff you can assign to a department and hope for the best. This is "the future of your entire business" stuff.

The Questions You Should Be Asking (Instead of Delegating)

When a leader tells me their [insert department here] is "handling" a strategic initiative, I ask them these questions:

1. **What specific business problems are you solving?** (Not "we need to modernize" – actual problems with actual costs attached)
2. **How will you measure success?** (And please be specific – "better efficiency" isn't a measurement)
3. **What resources and capabilities do you need that you don't currently have?**
4. **How will this change your customer experience?** (Because it will, whether you plan for it or not)
5. **What could go wrong, and how will you handle it?** (Spoiler: Things will go wrong)

If you can't answer these questions, you're not leading. You're just hoping someone else will figure it out for you.

Your Team Needs You to Lead, Not Disappear

Here's something that might surprise you: Your departments actually want you involved. They're probably frustrated that you keep asking them to "make [big strategic thing] happen" without giving them business context, strategic direction, or cross-functional coordination.

It's like asking different people to plan different parts of a cross-country road trip without telling them the route, budget, or timeline. They can research their individual pieces all day, but they can't make strategic decisions about your business without you.

Your departments can execute brilliantly within their expertise. They cannot (and should not) decide without you:

- Which business priorities to tackle first
- How to coordinate across departments
- What trade-offs you're willing to make
- How to communicate changes to stakeholders
- What risks you're willing to accept

Those are leadership decisions. Your decisions.

Three Things You Can Do Tomorrow

1. Schedule a “big picture” session with all involved departments. Make sure everyone understands not only their piece, but how all the pieces fit together and why.

2. Identify the specific business outcome you’re trying to achieve. Not the process you want to improve – the actual business result that matters to customers, employees, or shareholders.

3. Ask each department what they need from you to be successful. I guarantee the answer isn’t “just leave us alone to figure it out.”

The Bottom Line

Major strategic initiatives are going to impact your business whether you lead them or not. The question is: Do you want to be the leader who guided that transformation strategically, or the one who woke up one day to discover their company had been changed by forces they didn’t understand or direct?

Your departments can execute amazing work. But they can’t replace your leadership.

So stop hiding behind “my [department] is looking at it” and start actually leading. Your future self (and your stakeholders) will thank you.

What’s one strategic initiative you’ve been tempted to “delegate and disappear” from? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

August 27, 2025: The Organizational Readiness Assessment That Actually Works

I want to tell you a story about one of my more spectacular failures. Years ago, I was tasked with rolling out a new project management system—MS Project 2010 and SharePoint. On paper, it was a solid platform. In reality, it was a disaster. I tried to launch it not once, not twice, but three separate times. Each time, it failed.

Why? Because I was never given a clear “why.” I couldn’t tell the teams why we were switching, other than “leadership wants this.” The teams, who were perfectly happy with their own tracking tools, were never consulted. The new platform didn’t solve their problems; it just created new ones. The result was a massive waste of time, money, and, quite frankly, my sanity.

Sound familiar? Today, the pressure isn’t about SharePoint; it’s about AI. Every leader, every team, every company is feeling the heat to “do something with AI.” So we jump. We sign up for a tool, we task a team with “finding a use case,” and we cross our fingers. More often than not, it ends the same way my SharePoint project did: with a fizzle, not a bang.

The problem wasn’t the technology itself—it was that nobody had honestly assessed whether we were actually ready for this kind of transformation.

That’s why I’ve developed what I call the “brutally honest” readiness assessment - based on the 5P Framework. It’s not just a quick checklist you can breeze through to feel good about yourself. This thing forces you to confront the real gaps in your organization, and trust me, there are always gaps.

Why Most Readiness Assessments Miss the Mark

The thing about most AI readiness assessments is that they’re designed to make you feel confident about moving forward, not to actually prepare you for success. They ask surface-level questions like “Do you have leadership buy-in?” without digging into what that actually means.

Real readiness assessment means asking the uncomfortable questions. Like: Does your team actually know how to use AI beyond “write me a blog post”? (Spoiler alert: probably not.) Have you identified every single person who will be impacted by this change? Do you know what happens when your lead scoring suddenly triples your qualified leads?

The Five Pillars, But Deeper

The assessment I’ve built covers the same five foundational areas as the 5P Framework—Purpose, People, Process, Platform, and Performance—but it goes far beyond just checking boxes. Each section includes dozens of specific questions designed to uncover the real

state of your readiness.

Purpose: Beyond “We Want to Use AI”

Most organizations think having a purpose means saying “we want to improve efficiency with AI.” That’s not a purpose, that’s a wish. The purpose section of this assessment digs into whether you’ve actually connected your AI initiatives to specific business objectives, whether you’ve documented success metrics, and whether leadership has articulated how this connects to your long-term vision.

One question that always trips people up: “Is there consensus among stakeholders regarding initiative scope, boundaries, and expected outcomes?” I can’t tell you how many times I’ve seen projects derail because sales thought they were getting one thing, marketing expected another, and IT was building something completely different.

People: The Make-or-Break Factor

People are the linchpin of any successful AI implementation, and the assessment reflects that reality. We’re not just talking about whether someone on your team has used ChatGPT. It’s a good starting point, but your team needs more experience than that.

This section breaks down into three critical areas:

Team AI Literacy and Skills: Do your people actually know how to do deep research with AI? Can they create effective prompts? Do they understand the limitations? If generative AI has only been used at the surface level (like to create content), you’re not ready to effectively leverage AI for complex business processes.

Leadership and Stakeholder Buy-In: Is there visible, active executive sponsorship? Have you identified all the stakeholders who need to be engaged? I’m talking about everyone—if you’re implementing automated lead scoring, that impacts sales, marketing, customer support, development, IT, and leadership. Have they all been looped in?

Change Management: Here’s where it gets real. Real tough, that is. Is your organizational culture actually receptive to workflow changes? Do you have established change management methodologies? Have you identified potential resistance and addressed it proactively?

One of my favorite questions in this section is: “Have early adopters and internal champions been identified to support adoption and engagement?” Change management is often seen as a cultural shift, and you need your culture carriers on board to support your initiatives.

Process: The Foundation Everything Else Builds On

The process section exposes something most organizations don’t want to admit: their current processes aren’t well-defined or documented. If you can’t clearly articulate how

something works today, you definitely can't improve it with AI tomorrow.

Existing Workflow Efficiency: Are your current processes actually documented and understood by all stakeholders? (Even at Trust Insights, we don't have everything documented perfectly—it's an ongoing challenge.) But here's the thing: the more you have documented, the easier it becomes to introduce new technology and manage change.

AI Governance and Ethical Guidelines: Do you have established governance structures for AI implementation? Are there documented ethical guidelines? Have you identified potential risks and mitigation strategies for each initiative?

This is where the assessment gets into the nitty-gritty of compliance requirements, regulatory considerations, and industry-specific guidelines. If you're handling PHI, PII, or operating under GDPR, HIPAA, or COPPA regulations, you need to know how AI fits into those requirements.

Platform: More Than Just "Does It Work?"

The platform assessment goes way deeper than basic compatibility questions. We're talking about whether your current martech stack can actually integrate with AI solutions, whether you have the APIs and data exchange mechanisms necessary, and whether your existing technology environment is flexible enough to accommodate new solutions.

Technical Expertise and Support: Do you have sufficient technical knowledge to implement and manage AI solutions? Are IT and technical resources allocated and committed? Do you have access to specialized expertise, either internal or external?

Infrastructure Readiness: Can your current technology environment actually support AI solutions? Have computing, storage, and processing capabilities been assessed? Is your security environment sufficient for sensitive data use?

Performance: The 6Cs Deep Dive

This is where the assessment gets seriously comprehensive. The performance section breaks down into six critical areas—what I call the 6Cs of data quality: Clean, Complete, Comprehensive, Chosen, Credible, and Calculable.

Each C includes multiple detailed questions about your data foundation, from whether your data is free from significant errors and duplications to whether you have established processes for ongoing data quality maintenance.

For example, under "Credible," we ask: Are your data sources reliable and trusted? Have you documented data sources and origin for key assets? Do you have established standards for data source evaluation? Have potential data biases been identified and addressed?

The Real Assessment

When you complete this assessment honestly (and I mean brutally honest), most organizations score around 2.3 out of 5. That's not a failure—that's reality. It means you have work to do before you start implementing AI solutions.

Scores below 3 in any category indicate areas requiring focused attention before proceeding with implementation. Categories scoring 3–4 represent areas for ongoing improvement. Only categories scoring 5 indicate organizational strengths that can actually support successful AI adoption.

Why This Level of Detail Matters

I know this feels like a lot. Trust me, I get it. But here's what I've learned from watching countless AI implementations: the organizations that succeed are the ones that do this deep assessment work upfront. The ones that skip it? They're the ones calling me six weeks later asking how to fix the chaos.

This assessment forces you to move from vague feelings about readiness to concrete evaluation of your organizational capabilities. It identifies gaps before they become expensive problems. And it creates a roadmap for addressing those gaps systematically.

Your Next Step

When it comes to initiatives, where are the failure points? Is it people? Is it the process? How long do new things last, and how quickly do those ideas get shelved? The next time you want to introduce a new technology, or change a process, take a step back and assess the readiness of your organization with a critical eye.

Are you being honest about the "readiness" of your organization? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

p.s. If you want a copy of the 5P Readiness Assessment, it is available in our new course, the AI-Ready Strategist, live on September 2nd. You can pre-order now through August 29th with the discount code: strategy2025 - go to trustinsights.ai/aistrategycourse

September 03, 2025: Why Being “AI-Ready” Is Really About Being Change-Ready

A friend recently said something that perfectly captures what leaders across industries are experiencing: “I know AI needs to be part of our strategy, but I’m struggling to move beyond the headlines to create something that actually works for our organization.”

This challenge extends far beyond AI implementation. The organizations that succeed with new technologies aren’t the most technically savvy—they’re the ones with systematic approaches to strategic change.

That’s exactly why we created our new course, [The AI-Ready Strategist](#), live now!

I try not to get too salesy in the newsletter, but you really need to know why this course is so great. Besides, I’ve been working on it for months, and if you go to the landing page and scroll through the instructor bios, you’ll get a fun surprise!

The Real Solution: Strategic Frameworks That Work

After working through countless digital transformations, here’s what we’ve learned: you don’t need another theoretical discussion about AI’s importance. You need practical frameworks and proven templates that help you move from good ideas to measurable results.

The AI-Ready Strategist gives you exactly that—the systematic approach to evaluate, plan, and implement any transformative technology, whether it’s AI today or whatever comes next.

What You Actually Get

This isn’t just another course about AI strategy. It’s a comprehensive toolkit built from decades of strategic work and real client implementations:

- **The TRIPS Framework** for identifying high-impact AI opportunities specific to your organization. No more being overwhelmed by endless possibilities—this shows you exactly where to focus.
- **The 5P Assessment** that evaluates your organization’s actual readiness for AI implementation. You’ll know precisely what gaps to address before moving forward.
- **ROI Projection Calculator and business case templates** that’ll help you get approved. These aren’t theoretical worksheets—they’re the exact tools that you’ll need to get the funding you’re after.
- **Strategic Proposal Templates** that communicate value clearly to leadership. Finally, a way to translate technical possibilities into business language that gets buy-in.
- **12-month implementation roadmap** for sustainable AI adoption. This roadmap

ensures your initiatives scale successfully instead of stalling after the pilot phase. Plus over 20 additional frameworks, worksheets, and checklists that you can implement immediately.

Why These Tools Matter

Here's what makes this different: every framework addresses the real challenges you're facing right now.

Struggling to get leadership buy-in? The goal alignment and proposal templates are designed specifically to secure approval and budget allocation.

Not sure where to start with AI implementation? The TRIPS framework cuts through the noise to show you exactly where AI will have the highest impact in your organization.

Worried about organizational readiness? The assessment tools reveal precisely what you need to address before moving forward, preventing costly false starts.

These aren't generic templates. They're battle-tested frameworks that have consistently delivered results across diverse industries and organizational contexts.

Building Strategic Capabilities That Last

What you're really getting is the ability to approach any technology transformation with confidence. The frameworks you'll learn work for AI implementation, but they also work for automation projects, cloud migrations, or whatever disruptive technology emerges next year.

You're building strategic muscle that compounds over time. Each technology evaluation you approach systematically makes you better at the next one. Each successful implementation builds organizational confidence and capacity for future challenges.

The Compound Effect

When you have systematic approaches to technology adoption, everything changes. You stop reacting to technological change and start strategically leveraging it. You move from feeling overwhelmed by options to confidently identifying the right opportunities. You transform from struggling to get buy-in to consistently securing resources for high-impact initiatives.

That's the real value of strategic readiness: the ability to turn any technological opportunity into competitive advantage, regardless of what those technologies are or when they emerge.

What Success Looks Like

After completing this program, you'll approach technology decisions completely differently. You'll have proven methods to identify opportunities, build compelling business cases, and execute implementations that deliver measurable results.

More importantly, you'll have the strategic confidence that comes from having a systematic approach to transformative change.

Your Next Step

The AI-Ready Strategist represents months of development and decades of strategic expertise, distilled into immediately actionable frameworks and templates. I've already done the hard part of trial and error, and I'm serving up only the best of the best of what I've learned.

If you're ready to move from AI uncertainty to strategic confidence, this course gives you everything you need to succeed—not just with AI, but with any technological transformation your organization faces.

Want to be an AI-Ready Strategist? Get the course at trustinsights.ai/aistrategycourse

Are you ready for a real disruption? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

September 10, 2025: You Really Do Get What You Pay For

Last week, my dog walker spent exactly ten minutes with my dog. She took her outside, gave her quality attention, checked her water, and headed out. The bill? \$25.

For a moment, I felt that familiar sticker shock. Twenty-five dollars for ten minutes of work? That math made my brain hurt a little. But then I stepped back and reconsidered what I was actually paying for.

I'm paying for her experience with large breeds who can be... enthusiastic. Georgia is overly enthusiastic at times and 150 lbs of muscle. I'm paying for her background in pet safety and emergency care. I'm paying for the peace of mind that comes from knowing my dog is with someone I trust completely—someone who won't panic if something goes wrong.

In other words, I'm paying for expertise. And you know what? It's reassuringly expensive.

The "Reassuringly Expensive" Principle

My business partner Chris has this phrase about sushi being "reassuringly expensive." When you're about to eat raw fish, you don't want the cheapest option on the menu. You want confidence that someone with serious skills prepared your meal, that the ingredients are top-quality, and that the restaurant follows strict safety protocols.

The price tag becomes a reliable signal of quality, care, and expertise.

This principle applies far beyond sushi or pet care. Right now, it's especially relevant in the world of business consulting and digital transformation. (And trust me, I've seen enough transformation projects go sideways to know the difference good expertise makes.)

The AI Expert Explosion (And Why You Should Be Cautious)

Here's what's happening in the market right now: Everyone is suddenly an "AI expert." People who discovered ChatGPT a few months ago are now offering consulting services on artificial intelligence strategy. The market is flooded with inexpensive options and overnight experts.

I get the appeal of a bargain—who doesn't love saving money? But when you're making decisions that could transform your entire organization, the discount option carries some serious risk.

What Makes Something Worth the Investment

When I'm evaluating any service or expertise (and I've done this more times than I care to

count), here's what justifies a higher investment:

Time and Experience * Years of trial and error, with real lessons learned from failures * Pattern recognition that comes from seeing similar challenges across multiple organizations * The ability to anticipate obstacles before they derail your project (this one's huge)

Proven Track Record * Documented results with real companies facing real challenges * Case studies that demonstrate depth beyond surface-level success stories * References who will actually pick up the phone and give you honest feedback

Depth of Knowledge * Understanding of fundamental principles, not just whatever's trending this month * Ability to adapt strategies when technology evolves (because it absolutely will) * Strategic thinking that connects tools to measurable business outcomes

Ongoing Support * Confidence that your investment will deliver lasting value * Someone who will tell you honestly what won't work for your specific situation * Available guidance when implementation gets complicated (not if, when)

Why Our Course Represents Strategic Value

I'm going to be direct here: our new digital transformation course carries a significant price tag. And frankly, that makes me a little uncomfortable to talk about. But that investment reflects something specific.

We're not teaching you how to use AI tools—I'm not an AI expert, and I don't pretend to be. What we're teaching is how to prepare your organization for digital transformation, whether that involves AI or whatever technology comes down the pipeline next.

This distinction matters because tools change rapidly. I've watched countless "revolutionary" technologies come and go. But the fundamentals of process optimization, team dynamics, and organizational change management? Those stay remarkably consistent.

I've spent over twenty years working in process optimization, operations, team building, and organizational behavior. I've watched companies succeed spectacularly and fail miserably at transformation projects. I've made my share of mistakes, learned from them (sometimes the hard way), and developed systems that consistently deliver results.

That experience—those sometimes painful lessons—represents the real value of the investment.

The Reality of True Expertise

Here's something that genuinely makes me squirm: I really don't like calling myself an "expert." The word feels presumptuous, even after two decades doing this work.

But I am confident in my experience. The systems I've developed and refined. The patterns I've learned to recognize. The mistakes I've made and (hopefully) won't make again. The organizations I've successfully helped transform.

This knowledge didn't just appear overnight. It's the result of years of focused work, continuous refinement, and plenty of learning moments that weren't exactly fun at the time.

Your Strategic Evaluation Framework

The next time you're considering any significant service investment, use this evaluation process (I wish I'd had this checklist years ago):

Assess the True Value

1. What exactly am I purchasing? (Skills, experience, peace of mind, or simply a low price?)
2. What's their documented track record with challenges similar to mine?
3. How long have they been doing this specific type of work?
4. What support do they provide when implementation gets messy?

Questions to Ask Any "Expert"

Before making your decision, ask potential consultants or service providers these specific questions. Their responses will tell you everything you need to know:

Experience and Background * "Can you walk me through three specific projects similar to mine and the actual results you achieved?" * "What's the biggest mistake you've made in this type of project, and what did you learn from it?" * "How long have you been doing this exact type of work?" (Not adjacent work—this specific expertise)

Approach and Methodology * "What's your process for projects like mine, and how do you handle unexpected challenges?" * "Can you provide references from clients who faced similar challenges to ours?" * "What would you need to learn about our organization before proposing a solution?"

Ongoing Value * "How do you ensure the changes stick after the project ends?" * "What ongoing support do you provide during implementation?" * "What would you tell me if you thought your solution wasn't right for our situation?"

Pay attention not just to their answers, but to their confidence level, specificity, and willingness to discuss failures and limitations. The best consultants I've worked with are refreshingly honest about what didn't work.

The Bottom Line

Sometimes the most expensive option isn't the best choice. But often, a higher price reflects genuine value: proven experience, documented results, and the confidence that comes from working with someone who has been doing this work long enough to know what actually works (and what doesn't).

Your business transformation is too important to entrust to the lowest bidder. Look for the option that's reassuringly expensive—where the price reflects real value, proven experience, and the peace of mind that comes from working with someone who has the depth to guide you through the inevitable challenges.

The right investment in expertise today can save you significantly more in avoided mistakes, faster implementation, and sustainable results. (And fewer late-night calls wondering why nothing is working the way it's supposed to.)

What are you willing to invest in experts? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

Interested in learning more about our new AI-Ready Strategist Course? Sign up at trustinsights.ai/aistrategycourse

- Katie Robbert, CEO

September 17, 2025: Should You Let AI Make Your Decisions?

Last week, I found myself standing in my kitchen at 5 AM, staring at my coffee maker while my brain was already spinning with the day ahead. Forty-seven decisions awaited me before 9 AM: which client email to prioritize, whether to reschedule that strategy call, how to adjust our content calendar based on yesterday's analytics.

That's when the thought struck me: *What if I could strategically delegate some of these decisions?*

The idea was both exciting and daunting. Because while AI decisioning has become remarkably sophisticated, the line between "this could transform my efficiency" and "this could damage my business" comes down to one critical factor: genuine readiness.

Understanding AI Decisioning Beyond the Marketing Hype

Let's establish clarity around what AI decisioning actually entails. It's not about surrendering control to some autonomous system. Rather, it's automated decision-making based on data patterns and the specific parameters you establish.

Consider this example: instead of manually deciding when to send follow-up emails to leads who download your resources, AI decisioning can automatically trigger those emails, optimize send times, and personalize subject lines based on individual user behavior.

The AI analyzes relevant data points—download time, traffic source, previous engagement patterns—and makes decisions within the framework you've defined. The sophistication lies in the nuanced application of your business rules at scale.

Critical Boundaries: Where AI Decisioning Should Never Go

Early in my career, I made the mistake of over-automating too quickly. The lesson was expensive and memorable.

AI decisioning is inappropriate for:

- **High-stakes, irreversible decisions.** Personnel changes, major strategic pivots, or significant financial commitments require human judgment, contextual understanding, and intuitive assessment that AI cannot provide.
- **Situations requiring emotional intelligence.** Customer complaints, team dynamics, or sensitive client relationships demand human empathy and nuanced communication.
- **Processes you cannot clearly articulate.** If you cannot thoroughly explain your decision-making framework to your team, you're not prepared to delegate it to AI.

- **Brand voice and strategic messaging.** Authentic communication reflects your unique perspective and values—elements that generic AI cannot authentically replicate.

The 5P Readiness Assessment: Your Strategic Foundation

Before implementing any AI decisioning system, you must honestly evaluate your organizational readiness. Personally, I'd suggest using our 5P Framework to get started.

- **Purpose:** Have you clearly defined the strategic objectives for implementing AI decisioning? Technology adoption requires clear business justification beyond trend-following.
- **People:** Does your team understand which decisions will be automated and the rationale behind this change? Are they equipped to intervene when necessary? Have you addressed their concerns about the transition?
- **Processes:** Are your current decision-making workflows documented, optimized, and consistent? Automating inefficient processes simply scales inefficiency.
- **Platforms:** Does your technical infrastructure support AI decisioning requirements? Are your systems sufficiently integrated to provide the data quality AI needs for reliable decisions?
- **Performance:** How will you measure success? What specific metrics will indicate whether AI decisions outperform human ones?

Most organizations fail at AI decisioning because they skip this fundamental assessment, rushing toward the technology without establishing the necessary groundwork.

Your Vendor Evaluation Cheat Sheet

When you're ready to assess AI decisioning solutions, you need to cut through the sales presentations and ask the questions that actually matter. I've been in too many vendor demos where the technology looked impressive. And then we got into the specifics and it all fell apart.

Here are the essential questions we use in our vendor evaluation process, organized around the areas that will make or break your implementation:

The Integration Reality Check: * How does this actually integrate with our existing systems? (Get specifics, not vague promises about "seamless connectivity") * What technical requirements do we need to meet, and do we have them? * What's the real implementation timeline for someone like us?

The Security Deep Dive: * How is our data handled, stored, and protected? * What security certifications do you maintain, and can you prove it? * What happens if there's a data breach? (Have a plan, not just insurance)

The Bias Reality: * What data trained your model, and how do you handle bias? * Can we monitor the AI's decisions for fairness issues? * What's your process when bias is

discovered?

The Support Test: * What training and onboarding do you actually provide? * How do you handle it when things go wrong? * Can you show us case studies from businesses similar to ours?

The Future-Proofing Questions: * How does this scale as we grow? * What's your product roadmap, and how stable is your company? * How do you measure ROI, and what should we expect?

The key is getting specific examples and references you can actually verify. Any vendor who can't provide concrete answers to these questions isn't ready for your business. Don't forget, you can also ask for references, just like you would in any interview. If they aren't willing to provide some, you might want to move on to a different vendor.

Your Strategic Implementation Roadmap

Here's how to begin this evaluation process strategically:

1. **Identify one repetitive decision in your daily workflow.** Start with manageable scope—perhaps with highly repetitive tasks of lower priority.
2. **Document your current decision-making process thoroughly.** What factors influence your choices? What data do you consider? Be brutally honest about whether this process actually exists anywhere besides your head.
3. **Conduct the delegation test.** Could you teach someone else to make this exact decision consistently? If not, you're not ready for AI implementation.
4. **Download our AI Ready Marketing Strategy Kit** to access a foundational version of the 5P assessment and begin evaluating your organizational readiness.

The objective isn't replacing human judgment with artificial intelligence. It's strategically freeing your cognitive capacity for decisions that genuinely require your expertise, creativity, and strategic insight.

Because ultimately, your most valuable contribution isn't making routine decisions—it's applying your unique strategic thinking where it creates the greatest impact.

What decision are you handing over to AI? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

Ready to develop a comprehensive AI strategy? The AI Ready Strategist Course provides the complete framework for confident AI evaluation, implementation, and optimization—including our full vendor evaluation templates and 5P assessment tools. Strategic preparation today determines your competitive advantage tomorrow. Get your seat here: trustinsights.ai/aistrategycourse

- Katie Robbert, CEO

September 24, 2025: How to Advocate for AI Skills Training

Today, let's answer a reader question: "How do we convince executives and enablement leaders to invest in improving AI skills across the workforce?"

This is happening in organizations everywhere—executives are investing in AI technology while completely neglecting the human side of the equation. They love AI in theory, but they're often blind to the fact that their people don't know how to actually use it effectively.

Start with the Business Case, Not the Technology

When I work with teams trying to get executive buy-in for AI training, I tell them to flip their approach entirely. Don't start with "We need AI skills training." Start with "Here's how our current skill gaps are costing us money and opportunities."

Use the 5P Readiness Assessment from the AI Strategy Kit to document exactly where your team stands. This assessment evaluates your organization's readiness across five critical dimensions: Purpose, People, Process, Platform, and Performance. When you can show leadership that 60% of your marketing team scores below a 3 on AI literacy, and connect that to slower campaign development or missed optimization opportunities, suddenly you're speaking their language.

Connect Skills to Strategic Objectives

The Goal Alignment Worksheet is perfect for this. This tool helps you map your AI initiatives directly to specific business objectives, ensuring every AI investment has a clear strategic purpose. Take your organization's current strategic priorities and map them against your team's AI capabilities. If your company wants to increase personalization by 40% this year, but your team doesn't know how to implement AI-driven content optimization, that's a problem executives can understand.

For this, I recommend creating a simple visual (like a matrix) showing what your organization wants to achieve, what AI skills are required to get there, and where your current gaps exist. Make it visual. Make it obvious.

Quantify the Opportunity Cost

Nothing gets executive attention like lost revenue potential. Use the ROI Calculator to project what improved AI skills could deliver. This tool helps you quantify both the financial investment and expected returns from AI initiatives, translating operational improvements into dollars and cents. For example, if better prompt engineering could reduce content creation time by 30%, calculate what that means in terms of output capacity and cost savings.

But don't stop there. Also calculate the cost of doing nothing. How much business could you lose to competitors who are leveraging AI more effectively? What opportunities are you missing because your team lacks the skills to execute?

Present a Phased Roadmap, Not a Wishlist

Executives hate open-ended training requests that feel like education for education's sake. Instead, use the 12-Month AI Marketing Roadmap Template to show how skills development directly supports business milestones. This template helps you sequence AI initiatives across quarters while addressing all dimensions of successful implementation—from people development to platform integration.

Quarter 1 might focus on foundational prompt engineering tied to improving campaign development speed. Quarter 2 could tackle data analysis skills needed for better audience segmentation. Each phase should have clear business outcomes attached.

Address the Real Resistance Points

Let me be honest about what's really happening in those executive meetings. Leaders are worried about training costs, time away from "real work," and whether people will actually apply what they learn. They know you need the training, and they want you to have it. They are struggling to figure out how to make it work. This is where you can help. You need to address these concerns head-on.

Show them how the TRIPS framework can help prioritize where AI training will have the highest impact. TRIPS evaluates potential AI use cases across five factors: Time consumed, Repetition, Importance, Pain points, and Sufficient data availability. Demonstrate that you're not asking for generic AI education, but targeted skill development that directly improves processes they care about.

Make it About Competitive Advantage

Frame AI skills as competitive intelligence. When your team can effectively use AI for market analysis, content optimization, and campaign performance prediction, you're not just keeping up with competitors—you're potentially leaping ahead of them.

The bottom line is this: executives will invest in AI skills when they see the direct connection between those skills and business results. Your job isn't to convince them AI is important. Your job is to show them exactly how AI skills translate into the outcomes they're already trying to achieve.

Stop asking for a training budget and start presenting skill development as the missing piece of their strategic puzzle. That's when you'll get their attention—and their investment.

[Click here to get your free copy of the AI-Ready Marketing Strategy Kit](#)

How are you making the case for more AI training? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

October 01, 2025: Why Your Annual Plans Are Only as Good as Your Data

I'll never forget the planning meeting where everything fell apart. (Ok, so not just one meeting, but stay with me.)

We were three hours into our annual planning session—you know the kind, where everyone's crammed into a conference room with laptops, spreadsheets, and increasingly cold coffee—when someone asked what should have been a simple question: "What was our actual conversion rate last quarter?"

Silence.

Then, chaos. The marketing team pulled up one number. Sales had a different number. Product had yet another number. And here's the kicker: we were all looking at data that was supposedly from the same source.

That meeting ended with no decisions made, a lot of frustration, and a very expensive realization: we had been making plans based on data we couldn't trust. And if we couldn't trust our historical data, how on earth were we supposed to make confident predictions about the future?

The Uncomfortable Truth About Data Quality

Here's what I've learned after years of working with organizations of all sizes: **most companies are making critical business decisions based on fundamentally flawed data, and they don't even know it.**

It's not that people are careless. It's that data quality issues are sneaky. They accumulate over time, like dust bunnies under the couch. One missing field here, one inconsistent naming convention there, a few duplicates that no one bothered to clean up. Before you know it, you're sitting in that planning meeting with three different versions of the truth and no way to know which one is actually true.

And when it comes to AI? That's where things get really interesting (and by interesting, I mean potentially disastrous).

What Actually Happens When Your Data Is a Mess

Let me get specific here, because "bad data quality" sounds abstract until it hits you in the face with real consequences:

In Annual Planning:

- Your forecasts are based on incomplete or incorrect historical data, so you're essentially guessing
- Different departments can't align on shared goals because they're working from different "truths"
- You waste hours (or days) in meetings trying to reconcile conflicting numbers instead of actually planning
- Leadership loses confidence in the team's ability to execute because the foundation is shaky

In AI Proof of Concepts:

- Your AI model learns from flawed data and produces flawed results (garbage in, garbage out is still very much a thing)
- You can't tell if the AI isn't working because the model is bad or because the data is bad
- You waste budget on AI tools that never had a chance to succeed
- Your team gets demoralized when the "exciting new AI project" fails, even though it was doomed from the start

In Day-to-Day Business:

- Your team wastes time manually cleaning and reconciling data instead of doing their actual jobs
- You can't answer basic questions about your business with confidence
- Customer experiences suffer because your data about them is incomplete or wrong
- You miss opportunities because you can't trust the signals you're seeing

The really painful part? These issues compound. Bad data leads to bad decisions, which lead to more bad data, which lead to worse decisions. It's a vicious cycle.

Why "We'll Fix It Later" Doesn't Work

I get it. Data quality work isn't sexy. It's not the exciting new AI tool or the flashy dashboard that everyone wants to talk about in the leadership meeting. It's the digital equivalent of cleaning out the garage—necessary but not exactly thrilling.

But here's the thing: you can't build on a broken foundation.

Think about it this way. If you were building a house, would you:

1. Start with a solid foundation and then build up, or
2. Build the whole house and then try to fix the foundation later?

Obviously, you'd start with the foundation. Yet in business, we do the equivalent of option 2 all the time. We invest in expensive tools, hire specialized talent, and launch ambitious initiatives—all while ignoring the fact that our foundational data is crumbling beneath us.

The Case for Starting with an Assessment

So what's the answer? Do you need to stop everything and spend six months cleaning data

before you can do anything else?

No. (Thank goodness, because no one has six months to spare.)

What you need is to **understand where you actually stand**. And that's where a proper data quality assessment comes in.

Think of it like going to the doctor for a check-up. You don't need to cure every ailment before you walk in the door. You need a diagnosis. You need someone to tell you what's working, what's not, and what needs attention first.

A good data quality audit will:

- Give you an honest assessment of your current state (not a sugar-coated "everything's fine" report)
- Identify the specific issues that are causing the most pain or risk
- Prioritize what needs to be fixed first (because you can't fix everything at once)
- Provide a clear, actionable roadmap for improvement
- Give you the ammunition you need to get buy-in and resources for the necessary work

What Makes a Data Quality Assessment Actually Useful

Not all assessments are created equal. I've seen plenty of reports that are essentially 100 pages of charts that tell you "your data has some issues" without actually helping you understand what to do about it.

A useful assessment needs to:

Be comprehensive. It should look at your data from multiple angles—not just "Is it clean?" but also "Is it complete? Is it actually measuring what you think it is measuring? Is it in a format you can use?"

Be specific. Instead of vague statements like "data quality could be improved," you need concrete examples: "The 'lead source' field is blank in 37% of records" or "There are 14 different ways that 'Trust Insights' is spelled in your CRM."

Be actionable. You should walk away knowing exactly what needs to happen next, not just that "something should probably be done."

Be realistic. Not every data quality issue needs to be fixed immediately. A good assessment helps you understand which issues are blockers and which ones you can live with (at least for now).

Here's the Real Talk

Your annual plans are only as reliable as the data they're based on. Your AI initiatives are only as effective as the data they learn from. You don't need perfect data to move forward—but you do need to know where you stand and have a plan to get better.

So before you dive into planning season or kick off that exciting AI project, check the foundation. Start with an honest assessment, be realistic about what you find, and prioritize fixing what actually matters for your goals. Get help if you need it (this is literally what we do at Trust Insights with our [AI-Ready Data Quality Audit](#)).

You'll save yourself a lot of headaches and a lot of awkward meetings where no one can agree on the numbers.

Trust me on this one. I've been in that conference room with the cold coffee and the conflicting spreadsheets. It's not where you want to be.

Ready to find out where your data actually stands? Our AI-Ready Data Quality Audit gives you a clear, honest assessment of your data health and a prioritized roadmap for improvement. Learn more at trustinsights.ai/expertise/services/ai-ready-data-quality-audit/ or shoot me a message—I'm happy to talk through whether this is the right fit for what you need.

How confident are you in your data quality? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

October 08, 2025: We've Lost the Plot on Planning- Part 1

I've been in a lot of planning meetings lately. And I mean *a lot*.

Here's what I'm noticing: everyone's talking about AI. How to use AI for planning. How AI will revolutionize their processes. How they need an AI strategy.

I get it. AI is powerful. It's transformative. But somewhere between "We need to leverage AI" and "What's our AI roadmap?" we've completely forgotten to ask the most basic question:

What problem are we actually trying to solve for our customers?

The Planning Problem We've Created

Planning has become an internal exercise. We sit in conference rooms (or Zoom calls) and talk about:

- Operational efficiencies
- ROI metrics
- Resource optimization
- Process improvements
- Technology adoption

These things matter. Of course they do.

But when was the last time you heard someone lead a planning session with: "What does our customer actually need, and how do we make their lives easier?"

Where We Went Wrong

The shift happened gradually. Planning became about:

What we want to achieve instead of **what our customers need to accomplish.**

How we can work smarter instead of **how we can serve better.**

What technology should we use instead of **what problems we should solve.**

And AI? It's just amplified this problem. Now we're adding another layer of internal focus: "How do we use AI in our planning?"

Why This Matters Right Now

Here's the thing: when planning becomes disconnected from the end user, a few things happen:

1. **You build things nobody wants.** You've optimized processes that don't actually address customer pain points.
2. **Your team loses direction.** Without a clear customer-focused purpose, every priority feels equally important (which means nothing is actually a priority).
3. **You waste resources.** All that efficiency you're planning for? It doesn't matter if you're efficiently building the wrong thing.
4. **You miss opportunities.** While you're focused inward, your customer is telling you exactly what they need—and you're not listening.

The Real Cost of Complicated Planning

I see organizations with 47-slide strategy decks. Detailed roadmaps that require a decoder ring. Planning frameworks so complex that no one can remember them, let alone use them.

And at the end of all that planning? Teams still don't know what to do on Monday morning.

Meanwhile, the customer is still struggling with the same problem they had six months ago.

Getting Back to Basics

This isn't about throwing out AI. It's not about ignoring efficiency or ROI.

It's about remembering the point of all this planning in the first place: **to serve your customers better.**

Everything else—the AI, the optimization, the efficiencies—those are tools to achieve that goal. Not the goal itself.

In Part 2, I'll walk through how to refocus your planning using Trust Insights' 5P Framework. It's straightforward; it keeps the customer at the center, and it actually helps your team know what to do next.

Because here's the truth: simple planning that focuses on your customer will always outperform complicated planning that focuses on your internal operations.

Are you overcomplicating your strategic planning? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

October 15, 2025: We've Lost the Plot on Planning- Part 2

Remember the BIG question from Part 1?

What problem are we actually trying to solve for our customers?

That's where we start. Not with AI. Not with efficiency metrics. Not with technology selection.

With your customer.

And the framework that keeps you focused? The Trust Insights 5P Framework: Purpose, People, Process, Platform, Performance.

It's intentionally simple. Because simple is what actually gets used.

Why This Framework Works

Before I break down each P, here's why this approach cuts through the planning noise:

It forces you to answer questions in order. You can't jump to Platform (the shiny AI tool) without first defining Purpose (what your customer needs). Resist the urge; I am begging you.

It keeps everyone aligned. Five components. That's it. Your team can remember them. More importantly, they can use them.

It's customer-centric by design. Every P connects back to serving your end user better.

Let's walk through it.

Purpose: Start With Why (And For Whom)

- What customer problem are we solving?
- What does success look like *for them*?
- What need are we addressing?

This is not your mission statement. This is not a list of your internal goals.

This is: "Our customer is struggling with X, and we're going to help them accomplish Y."

Everything else flows from this. If you can't articulate the customer problem clearly, stop.

Don't move to the next P because without clarity here, you're guessing.

People: Who Needs to Be Involved

- Who are we serving? (your end user)
- Who needs to be part of solving this?
- What skills and perspectives do we need?
- Who has decision-making authority?

Notice what we're NOT doing here: we're not reorganizing your entire company. We're identifying who needs to be involved in solving this specific customer problem. That's it.

And yes, your customer might need to be part of this conversation. Revolutionary concept, I know.

Process: How Will We Actually Do This

- What steps do we need to take?
- In what order?
- What are the decision points?
- How will we handle roadblocks?

This is where you get practical. But - and this is critical - your process should be as simple as possible while still being effective. And don't forget to document it!

If your process requires a flowchart with 47 decision trees, you've overcomplicated it. Simplify.

Platform: What Tools Support This Work

- What technology do we need? Like, really really need? (not just want)
- What tools will help us serve the customer better?
- What do we already have that works?
- What's actually missing?

Here's where AI comes in. Maybe. If it solves the customer problem better than what you have.

But Platform is fourth for a reason. You don't start here. You arrive here after you know what you're trying to accomplish, who's involved, and how you'll do it.

BIG TAKEAWAY: Stop buying tools looking for problems. Start with problems and find the right tools.

Performance: How Do We Know It's Working

- What metrics actually matter to the customer?
- How will we measure if we've solved their problem?
- What data do we need to collect?

- How often do we evaluate and adjust?

Your performance metrics should reflect customer value, not just internal efficiency.

Yes, track your operational metrics. But if you've improved efficiency by 30% and your customer is still frustrated, you're measuring the wrong things.

How the 5Ps Work Together

Here's the key: **you can't skip steps.**

You can't define Performance metrics without knowing your Purpose. You can't select a Platform without understanding your Process. You can't identify the right People without clarity on what customer problem you're solving.

The framework is sequential for a reason. It keeps you honest. It keeps you focused on the customer.

Your Next Steps

Pick one initiative. Just one.

Walk through the 5Ps:

1. **Purpose:** Write down the specific customer problem you are solving. One sentence.
2. **People:** List who needs to be involved. Keep it minimal.
3. **Process:** Outline the basic steps. Keep it simple.
4. **Platform:** Identify what tools you actually need. Start with what you have.
5. **Performance:** Define 2-3 metrics that demonstrate customer value.

That's it. You should be able to do this in one focused session.

The Bottom Line

Simplifying your strategy doesn't mean dumbing it down. It means cutting out everything that doesn't serve your customer.

The 5P Framework gives you a way to plan that's:

- Clear enough that everyone understands it
- Simple enough that people actually use it
- Focused enough that you stay connected to customer needs
- Flexible enough to work across different initiatives

AI, efficiencies, ROI - they all have their place. But they're in service of something bigger: solving real problems for real people.

Start there. Everything else follows.

How are you un-complicating your strategic planning? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

October 22, 2025: Getting Started with Workflow Automation

I was at MAICON last week, and I realized there was a lot of talk about the new technology, but not a lot of talk about it from a non-technical perspective. The tech still felt out of reach and overwhelming to a lot of us. When I first heard about workflow automation tools, my brain immediately went to “that’s for developers,” and I sort of tuned out. Which is hilarious because I’m a big advocate for repeatable processes and automation.

But then I actually tried using these tools. It turns out they’re not just for people like Chris anymore.

What Are We Even Talking About?

Think of workflow automation tools like n8n and Google’s Opal as your digital assistants that never sleep, never complain, and never forget a step. They’re platforms that connect your different tools together and automatically move information between them based on rules you set up.

The game-changer? You don’t need to know how to code anymore. Both n8n and Opal now let you describe what you want in plain English, and they’ll build the workflow for you. It’s like having a really patient tech-savvy friend who actually understands what you’re trying to accomplish.

So, Which One Should You Use?

Here’s the simple breakdown:

Google Opal works exclusively within Google Workspace (for now). If your world revolves around Gmail, Google Sheets, Google Docs, and Google Drive, this is your friend. It’s integrated, it’s relatively straightforward, and it plays nicely with all your Google tools.

n8n is the more adventurous option. It connects to hundreds of different platforms—your CRM, your social media tools, your project management software, and your email marketing platform. If you need to connect tools outside the Google ecosystem, n8n is where you want to be.

Start With Strategy (Not the Tool)

Before you dive into either platform, pause. I know the temptation is to just start clicking around and seeing what happens, but trust me—that way leads to frustration and abandoned half-built workflows.

Instead, use the [Trust Insights 5P Framework](#) to map out what you’re actually trying to

accomplish:

1. **Purpose:** What's the goal of this workflow?
2. **People:** Who's involved and who needs the output?
3. **Process:** What are the actual steps that need to happen?
4. **Platform:** What tools need to talk to each other?
5. **Performance:** How will you know if it's working?

This framework forces you to think through the entire project before you build anything. It helps you identify which tools need to integrate, what the actual output should look like, and who needs to receive that output. Plus, it will save you from building something that technically works but doesn't actually solve your problem.

Simple Workflows to Get You Started

Let's talk about some practical, immediately useful workflows that do not require a computer science degree:

For Marketing:

- Monitor specific social media mentions and compile them into a weekly report
- Automatically disseminate your content across multiple platforms when you publish a new blog post
- Track campaign performance metrics and send a daily summary to your team

For Operations:

- Create new project folders in Google Drive when a new client is added to your CRM
- Send automated follow-up emails based on specific triggers (like a form submission or a missed payment)
- Update your project management tool when tasks are marked as complete in another system
- Compile feedback or survey responses into a formatted report and distribute it to stakeholders

The key is to start small. Pick one annoying task that you do manually at least once a week. That's your first workflow.

How to Actually Get Started

1. **Document your current process:** Write down every single step you take manually. Be specific. "Check email" isn't helpful. "Check marketing@company.com for form submissions with 'New Lead' in the subject line" is helpful.
2. **Identify your trigger:** What starts this process? A new email? A new row in a spreadsheet? A specific time of day?
3. **Map your actions:** What happens after the trigger? Where does the data need to go? What needs to be created or updated?
4. **Choose your platform:** If everything lives in Google Workspace, try Opal. If you need broader integrations, go with n8n.

Describe what you want: Instead of trying to build it piece by piece, start by telling the

system what you're trying to do in plain language. Let it create the initial workflow, then adjust from there.

For both of these platforms, you have the option of writing a prompt. You can use your requirements from the 5P framework to do this. Having your information organized will get you to the end result faster.

Here is a simple example: The 5P Framework in Action

Purpose

Create and distribute a weekly content performance report that shows which blog posts and social media content performed best, so the marketing team can identify trends and plan future content accordingly.

People

Who's involved:

- Marketing Manager (needs the full report for strategic decisions)
- Content Writers (need to see which topics resonate)
- Social Media Manager (needs engagement metrics)

Who creates it:

- Currently: You, manually, for about an hour every Monday

Who receives it:

- The marketing team via email
- Data is also saved to a shared Google Sheet for historical tracking

Process

Here's the step-by-step breakdown:

1. Every Monday at 8 a.m., the workflow triggers automatically
2. Pull last week's data from Google Analytics (page views, time on page, bounce rate for blog posts)
3. Pull last week's social media metrics (likes, comments, shares, reach)
4. Compile the data into a Google Sheet with the date range clearly labeled
5. Create a formatted summary showing:
 - Top 5 performing blog posts
 - Top 5 social media posts
 - Week-over-week comparison
 - Any notable outliers or trends
6. Generate a simple visualization (which could be as basic as conditional formatting in the sheet)
7. Send an email to the marketing team with the summary and a link to the full data

Platform

Tools that need to integrate:

- Google Analytics (where blog performance data lives)
- Social media platforms (Facebook, LinkedIn, Twitter—wherever you're active)
- Google Sheets (where the data is compiled and stored)
- Gmail (for sending the weekly email)

Performance

How you'll know it's working:

- The report arrives in your inbox every Monday by 8:30 a.m. without anyone touching it
- The data matches what you'd get if you pulled it manually (verify this for the first few weeks)
- Team members stop asking, "When will we get this week's numbers?"
- You're getting back that hour every Monday to do literally anything else

Success metrics:

- 100% on-time delivery (if it's not in your inbox Monday morning, something's broken)
- Data accuracy (spot-check the first month against manual pulls)
- Time saved (you should reclaim about 4 hours per month)

What to monitor:

- Make sure the data connections don't break when platforms update their APIs (this happens; it's annoying, but it's fixable)
- Check that the email isn't going to spam folders
- Verify that the Google Sheet isn't getting too large (you might need to archive old data quarterly)

The Reality Check

Will your first workflow be perfect? Absolutely not. Will you have to tinker with it? Yes. Will you occasionally break something and have to figure out why? Probably.

But here's what I know: every hour you spend setting up these workflows will save you multiples of that time over the coming months. Plus, once you get one working, the second one is easier. And the third one is even easier than that.

Start with one small, annoying task. Document it using the 5P Framework. Pick your platform. And just try it.

Your 4 p.m. Friday self will thank you.

How are you automating your workflows? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

October 29, 2025: The Case for Knowledge Blocks

Last week, I spent several hours having a conversation with myself, downloading everything I know about software development, project management, quality assurance, stakeholder management, and requirements gathering.

Yep, you read that right. I literally sat there and brain-dumped two decades of SDLC knowledge, best practices, hard-won lessons about database architecture, UI design principles, QA testing protocols, and every agile vs. waterfall battle scar I've collected. Then I gave that raw transcript to generative AI, tested the heck out of it—asking questions, challenging responses, refining instructions—until I had what basically amounts to a virtual version of me as a Business Analyst that the team could access 24/7.

Why would I do this? Because while those focus areas are my expertise, it's not my current role. And I kept watching team members get stuck waiting for answers that I used to provide. Classic knowledge bottleneck.

The result? Chris loves it. (I'm also fairly certain he's created a Katie-CEO stand-in that's significantly meaner than I actually am, but that's a different conversation.)

What the Heck Are Knowledge Blocks?

Knowledge blocks are structured downloads of everything someone knows about a specific topic, captured in a way that can be turned into a custom AI assistant.

You don't have to create an interactive virtual version right away. Knowledge blocks work as standalone documentation too. But when you're ready, they transform into specialized consultants who:

- Never sleep or take vacation
- Remember every conversation
- Respond instantly
- Cost nothing after the initial setup

But unlike generic AI, these custom gems or GPTs are trained on YOUR specific expertise, YOUR company's methodologies, YOUR industry context.

Why This Actually Matters (Especially Now)

Most organizations are sitting on massive knowledge gaps they don't even realize they have.

What happens when your senior developer is out for two weeks? Your project manager leaves suddenly? Your newest team member needs to ramp up but everyone's slammed? You're scaling and can't afford to hire another expert yet?

Traditionally, we've tried to solve this with documentation. And look, I love good documentation. But documentation is static, hard to search, rarely updated, and let's be honest—nobody reads it.

Knowledge blocks are different because they can be interactive. They answer specific questions. They walk people through processes. They explain the “why” behind the “what.”

The Real Value Isn't What You Think

When I first mentioned this to clients, most jumped to: “Oh, so it's about replacing people?”

No. Hard stop.

This is about:

1. Knowledge preservation - What happens to your institutional knowledge when people leave? Usually it walks out the door with them. Now it doesn't have to.

2. Scaling expertise - I can only talk to one person at a time. My BA gem? It can handle the entire team simultaneously.

3. Reducing bottlenecks - How many hours are wasted waiting for Subject Matter Experts to respond to emails? How many decisions are delayed?

4. Consistent quality - Everyone gets the same level of expertise, not whatever version they receive depending on how busy you are when they ask.

5. Empowering autonomy - People can self-serve answers and move forward without waiting, which builds confidence and speeds up delivery.

The Foundation: Knowledge Blocks Every Company Needs

Before you start creating specialized role-based knowledge blocks, there are foundational ones that every company should build first. Think of these as your organizational operating system.

Your Company Knowledge Block: This isn't your generic “About Us” page. This is the deep version—your origin story, why you exist, what problems you solve, your values and how you actually live them (not just what's on the wall), how decisions get made, your company culture, and the unwritten rules that make your organization work. New hires should be able to read this and understand not just what you do, but how and why you do it.

Your Products/Services Knowledge Block: Everything about what you sell. Features,

benefits, use cases, pricing structures, common objections, and how to address them, success stories, what makes you different from competitors, and crucially—what you DON'T do. This eliminates the game of telephone that happens when someone three degrees removed from the product team tries to explain your offering.

Your Sales Approach Knowledge Block: How you actually sell. Your sales process, qualification criteria, typical sales cycle length, common deal structures, when to discount (and when not to), how to handle specific objections, your CRM process, follow-up cadence, and the questions you ask prospects. This standardizes your approach while preserving what works.

Your Marketing Approach Knowledge Block: Your brand voice, messaging frameworks, content strategy, channel mix, what's worked (and what hasn't), campaign processes, approval workflows, design guidelines, and how marketing and sales work together. This keeps your brand consistent even as team members come and go.

Your ICP (Ideal Customer Profile) Knowledge Block: Who you serve, who you don't serve, the characteristics of your best customers, their pain points, how they make decisions, what success looks like for them, and red flags that indicate a bad fit. This helps everyone from sales to customer success to product development stay aligned on who you're building for.

Your Operations Knowledge Block: How stuff actually gets done. Project management methodology, communication protocols, meeting structures, decision-making frameworks, tool stack and why you chose each tool, vendor relationships, and the processes that keep things running. This is the stuff people usually have to learn through osmosis—which is wildly inefficient.

Here's why these matter more than you think: every single question a new hire asks in their first 90 days? It's probably answered in one of these blocks. Every time someone gives a prospect inconsistent information? It's because these blocks don't exist or aren't accessible. Every "let me check with someone" moment is time wasted that could be spent moving forward.

Plus, when you build these foundational blocks first, creating specialized role-based ones becomes easier because you're not re-explaining company basics every time.

The Process I Use

Creating effective knowledge blocks isn't just dumping information into AI and hoping for the best. Here's my approach:

Start with a specific domain - Don't try to capture everything someone knows. Pick one area. For me, it was specifically Business Analysis in software development—not marketing

analytics, not general business strategy, not CEO decision-making.

Structure the knowledge dump - I organized mine around core concepts and definitions, methodologies and frameworks, common scenarios and how to handle them, decision-making criteria, red flags and what to avoid, and tools and templates.

Layer in research and best practices - Your personal knowledge + established industry standards = comprehensive resource. I supplemented my experience with current SDLC best practices to make sure I wasn't just creating an echo chamber of my own biases.

Test ruthlessly - This is where most people stop too soon. I asked that gem probably 50+ questions, from basic to complex, including edge cases and scenarios I knew were tricky. Every time the response was off, I refined the instructions.

Get real users involved - I didn't just declare it done and walk away. I rolled it out to the team, asked for feedback, watched how they used it, and made adjustments.

Handling the Objections

"Won't this make people lazy?" Having access to expertise doesn't make people lazy. Having to wait three days for a simple answer makes people frustrated. There's a difference.

"What about confidential information?" Valid concern. Don't put confidential info in there. These blocks should contain methodologies, frameworks, and general expertise—not proprietary data or trade secrets.

"Isn't this just fancy documentation?" Documentation tells you what something is. These blocks can have conversations, ask clarifying questions, and adapt their responses based on context. That's not documentation; that's consultation.

"What if the AI gives wrong information?" That's why you test extensively. It's why you frame these as tools that augment human decision-making, not replace it. The block can guide someone through a process, but a human still needs to apply judgment.

What This Looks Like in Practice

Since rolling out the BA gem, here's what's changed:

The team asks it questions about requirements gathering, user story formatting, and when to push back on scope creep. They get immediate, consistent responses based on how I'd actually handle those situations.

Does it answer everything perfectly? Nope. Sometimes they still need to pull me in. But

now they come to me with more specific questions, having already worked through the basics. That's more efficient for everyone.

The Bottom Line

You're going to lose people. They'll leave your company, retire, get promoted, move to different roles. That's inevitable.

What's not inevitable is losing everything they know when they go.

Knowledge blocks aren't about replacing humans. They're about multiplying expertise, breaking bottlenecks, and building institutional knowledge that sticks around.

Start with the foundational blocks—company, products, sales, marketing, ICPs, operations. These alone will transform your onboarding and eliminate countless “who knows how to do this?” moments.

Then identify one critical knowledge gap. One area where people are constantly waiting for answers. One role where expertise is concentrated in too few people.

Create a knowledge block. Test it. Refine it. Deploy it.

Then watch what happens when your team can move forward instead of waiting.

What knowledge in your organization is trapped in someone's head right now? That's your starting point. Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

November 05, 2025: 7 Ways to Get Started With AI

Last month I was at an in-person event and I overheard someone saying, “we need to leverage AI across our entire customer journey,” while their partner was frantically scribbling notes, clearly trying to figure out what that actually meant in practice. They looked like they were about to cry.

After the session, she asked me, “My boss wants us to ‘do AI,’ but I don’t even know where to start. Do I need to use it for everything? Just some things? How do I know?”

Here’s what I told her (and what I’m telling you): You don’t need to boil the ocean. You just need to understand that generative AI does seven basic things. That’s it. Seven use cases that cover pretty much everything you’ve been hearing about. Once you know what those are, you can stop drowning in vague directives and start making actual decisions about where AI fits into your workflow.

Let me break it down.

The 7 Use Cases for Generative AI

1. Extraction

This is AI pulling specific information out of larger documents or datasets. Think of it as having an intern who can read through 500 pages of contracts and pull out every mention of pricing terms in about 30 seconds.

Where to start: Have your team identify their most tedious “find the needle in the haystack” tasks. Reading through customer feedback to find mentions of specific features? Pulling data points from reports? That’s extraction.

2. Classification

AI sorts things into categories. It’s like having someone organize your messy email inbox, but they can do it for customer inquiries, support tickets, leads, content types, or whatever you throw at them.

Where to start: Look at anything your team currently sorts manually. Support tickets that need routing to different departments? Customer feedback that needs tagging? Product reviews that need sentiment labels? Start there.

3. Summarization

Taking long-form content and condensing it down to the key points. (If you’ve ever asked ChatGPT to “sum this up,” you’ve used this.)

Where to start: Identify the meetings, reports, or documents where people consistently say, “I don’t have time to read all that.” Meeting notes that need to become action items?

Industry reports that need executive summaries? Those are your candidates.

4. Rewriting

Taking existing content and transforming it for a different audience, tone, or format. It's not creating from scratch; it's adapting what you already have.

Where to start: Look at content you're creating multiple versions of. Do you write the same update for executives and then again for your team in different language? Do you adapt blog posts for social media? That's rewriting work AI can handle.

5. Synthesis

This is where AI combines information from multiple sources to create something new. It's pulling together insights from different documents, datasets, or inputs to give you a unified view.

Where to start: Find the projects where someone is saying "I need to pull together information from marketing, sales, and customer service to see the full picture." Quarterly business reviews? Competitive analysis? Those synthesis tasks eat up massive amounts of time.

6. Question Answering

AI acts like a really well-informed colleague who's read all your documentation and can answer specific questions about it. This is your internal knowledge base on steroids.

Where to start: Think about the questions that get asked repeatedly. New employee onboarding questions? Policy clarifications? "Where did we document that decision?" If you're constantly Slacking the same people for the same information, that's a question-answering use case.

7. Generation

Creating new content from scratch based on prompts. This is the use case everyone jumps to first, but honestly, it's often not where you should start.

Where to start: Look at high-volume, formulaic content creation. First drafts of standard email responses? Social media post variations? Product descriptions that follow a template? Those are generation opportunities.

Identifying Where to Start

If knowing the 7 use cases doesn't help you with where to start, I'd suggest using the Trust Insights [TRIPS Framework](#). TRIPS helps you figure out which tasks are screaming to be automated with AI. Here's how it works:

The TRIPS Framework: Your AI Priority Filter

Time – How much time does this task consume? The more time something eats up, the

better a candidate it is for AI. If your team is spending hours doing something every week, that's a flashing neon sign.

Repetition – How repetitive is the task? AI loves repetitive work. Humans? Not so much. The more frequently you're doing the exact same type of task over and over, the more sense it makes to hand it off.

Importance – How important is the task, and what's the risk if it goes wrong? Here's the counterintuitive part: high-importance, high-risk tasks need MORE human oversight. You want to start with tasks that are relatively low-stakes. If AI messes up a social media post draft, you can fix it. If it messes up a regulatory filing? Yeah, that's not your starting point.

Pain – How much do you hate doing this task? Real talk: if your team groans every time they have to do something, that's a prime AI candidate. And here's why this matters beyond just morale: when you can show your team they'll never have to do [insert soul-crushing task here] again, you get instant buy-in for your AI initiatives.

Sufficient Data – Do you have examples of how this task should be done? The more examples you have (templates, past work, documented processes), the better AI will perform. If you're already using a template for something, AI should probably be doing it tomorrow.

Putting TRIPS Into Practice

List out everything your team is doing. Then score each task against TRIPS:

Task: Sorting incoming customer inquiries into categories

- Time: 2 hours per day ✓
- Repetition: Every. Single. Day. ✓
- Importance: Low risk (we can review before responding) ✓
- Pain: Everyone hates it ✓
- Sufficient Data: 6 months of categorized emails ✓

Result: This became test #1.

Task: Writing the quarterly executive summary

- Time: 8 hours once a quarter
- Repetition: Only quarterly ✗
- Importance: Very high, CEO reads this ✗
- Pain: Actually kind of satisfying to write
- Sufficient Data: Only 12 past examples ✗

Result: Not a good starting point for AI.

See how that works? Go through your whole list. The tasks that score high across multiple

TRIPS criteria? Those become your testing priorities.

The Bottom Line

Your executives aren't wrong for having big ideas about AI. But big ideas without a framework for execution just create chaos.

Use those seven use cases to understand what AI can do. Use TRIPS to figure out what AI should do for your team first. Then run small tests, measure what works, and scale from there.

You don't need a grand strategy. You need to identify which repetitive, time-consuming, painful tasks are sitting in your team's workflow right now and pick one to test this week.

Start there.

How are you choosing where to start with generative AI? Reply to this email or join our free Slack group, [Analytics for Marketers](#).

- Katie Robbert, CEO

November 12, 2025: Good Prompting is Good Delegation

I spent twenty minutes crafting the perfect prompt for an AI tool last week. I included context, specified the format, gave examples of what I wanted, outlined the tone—the whole nine yards.

Got exactly what I needed on the first try. Felt pretty smart about it.

Then I opened my email to delegate a project and started typing: “Hey, can you handle this client report? Need it by Friday.”

I stopped mid-sentence.

Because I realized I was about to make the exact same mistake I made as a brand new manager—the one that taught me one of my hardest lessons about leadership.

Here’s the thing—I *know* better. Setting clear expectations feels intuitive when you slow down and think about it. But when I’m in a rush or feeling lazy, I can still fall back into bad habits. And I was about to do exactly that.

The Lesson From Early in My Career

Way back when I was a brand new manager, nobody had taught me how to properly delegate. I thought delegation meant “assign it and walk away.”

So when a project came up, I’d confidently tell someone, “Hey, just handle this. It needs to be done by Friday.”

And then I’d watch it completely fall apart.

The deliverable was nothing like what I expected. The approach was all wrong. We missed deadlines. And my team members were frustrated because they felt like they’d failed—even though I had set them up to fail by giving them approximately zero useful information.

Yikes.

I should have known better, even as a new manager. The signs were all there. But I thought delegation was supposed to be quick and easy, not detailed and thoughtful.

Spoiler: I was wrong.

Eventually I figured out that **setting clear expectations is the key to successful delegation.**

And I don't just mean saying "do a good job" or "make it professional." I mean actually spelling out:

- **How it should be done** - What's the approach? What's the process?
- **SOPs and resources** - If documented processes exist, share them. If they don't, explain the steps.
- **Clear timelines** - Not just the final deadline, but check-in points along the way.
- **Examples of the output** - Show what "good" looks like. Share past examples or similar work.

Was this more work for me upfront? Absolutely.

Did it feel inefficient at first? You bet.

But here's the thing—it's exactly like requirements gathering in a project. You can either spend the time upfront getting clarity, or you can spend triple that time later fixing everything that went wrong because of ambiguity.

I learned this lesson years ago. And yet, when I'm in a rush or feeling lazy, I still have to catch myself before falling back into "just handle it" mode.

Why We Get Lazy

Sometimes we skip the clear expectations because:

- We're busy and it feels faster to just say "you know what I mean"
- We assume the other person has context they don't actually have
- We've explained something before and don't want to repeat ourselves
- Writing out detailed instructions feels like overkill for a "simple" task
- We're just...tired

But every single time I give in to that laziness, I end up spending more time fixing the results than I would have spent being clear upfront.

The math never works in favor of vague delegation. Never.

The Real Win

When you give someone clear expectations, resources, and examples, you're actually **giving them a real shot at learning and being successful.**

When I just said "handle this," I was setting my team members up to either fail or spend hours spinning their wheels trying to read my mind. Neither option felt good for them.

But when I took the time to say, “Here’s what we need, here’s how we’ve done similar projects before, here’s what success looks like, and here are the key milestones along the way”—suddenly they could actually learn something. They could be successful. And that success motivated them to take on more.

Turns out, people like being set up to win. Who knew?

The AI Connection

Which brings me back to that prompt I wrote last week—and that email I almost sent.

Good prompting is good delegation.

The same skills I had to learn as a manager—being specific, providing context, sharing examples, setting clear expectations—are exactly the skills you need to get good results from AI.

Compare these two prompts:

Bad prompt (my rushed, lazy energy): “Write a blog post about marketing.”

Good prompt (when I actually try): “Write a 750-word blog post about email marketing best practices for small business owners. Use a conversational tone, include 3–5 specific actionable tips, and format with clear headers. The audience is entrepreneurs who are doing their own marketing with limited time and budget. Include a brief example for each tip.”

See the difference? The second version includes:

- Specific scope and length
- Clear audience
- Tone guidance
- Format expectations
- Examples of what to include

It’s the same framework I eventually learned for delegating to my team. And when I use it for AI prompts, I get great results. When I skip it because I’m in a hurry? I get garbage and have to start over.

The AI won’t be frustrated or demotivated by my vague prompt—it’ll just give me mediocre results. But my team members? They deserve better than my lazy shortcuts.

Why This Matters for Everyone

If you’re struggling with AI tools and thinking “these just don’t work well,” I’d ask you to look

at your prompts.

Because here's the uncomfortable truth: if your prompts are vague, your delegation to your human team is probably vague too.

The quality of your prompts is a pretty good mirror for the quality of your delegation. And just like with my management mistakes, vague direction leads to:

- Wasted time
- Frustrating do-overs
- Deliverables that miss the mark
- People (or AI) that can't learn what you actually need

We know better. It feels intuitive when we slow down. But when we're rushed or lazy, we skip the work—and then we deal with the consequences.

The Upfront Work Pays Off

Yes, writing detailed prompts takes more time initially. Just like proper delegation takes more time upfront.

But just like I learned with requirements gathering—do the work on the front end, and you save massive amounts of time on execution and revisions.

When you give clear direction to your team, they can:

- Work more independently
- Make better decisions
- Deliver what you actually need
- Learn and grow in the process
- Feel motivated by success instead of deflated by confusion

The same is true when you give clear prompts to AI tools.

The Bottom Line

Good prompting is good delegation. They require the same skills: clarity, context, examples, and realistic expectations.

Every time you craft a better prompt, you're practicing the skills that make you a better manager. And every time you improve your delegation, you'll get better results from AI tools.

I learned this lesson the hard way as a new manager. And apparently I still need reminders not to fall back into lazy habits when I'm busy or rushed.

The results will always reflect the effort we put in upfront—whether we're delegating to a

person or prompting an AI.

So next time you're about to delegate something—or write a prompt—ask yourself: “Am I being clear and thorough, or am I being rushed and lazy?”

Catch yourself before you hit send on that vague email.

Your team (and your AI tools) will thank you.

Are you effectively delegating? Reply to this email or join the conversation in our free Slack community, [Analytics for Marketers!](#)

- Katie Robbert, CEO

November 19, 2025: The Five-Minute Hero: How AI Only Saves Your Butt When You've Done Your Homework

So there we were - well, I was deep in a spreadsheet for one client, and the rest of the team working diligently away, when my calendar notification popped up. You know the one - the cheerful little "Meeting in 5 minutes!" reminder that should have said, "You forgot to do that thing, didn't you?"

We had completely forgotten to pull together marketing recommendations for another client. Not because we were disorganized (well, not *entirely*), but because we had been juggling three other projects that were all just as urgent at the moment. And now we had exactly five minutes before we needed to present strategic marketing suggestions to a client who was paying good money for our expertise.

The Before Times vs. The Now Times

Let's be real about what would have happened five years ago in this scenario:

Pre-AI Options:

- Frantically email to reschedule (and look flaky)
- Walk in unprepared and wing it (and look incompetent)
- Pull out generic advice from our mental rolodex (and look lazy)
- Have a collective panic attack (and still show up unprepared)

None of these options end with us looking like professionals, let alone heroes.

But here's what happened instead:

We opened up Gemini, pulled up the client ICPs (ideal customer profiles) that we had built together, referenced the knowledge bases we had created about their services, and issued a well-structured prompt. Four minutes later, we had a comprehensive set of tailored marketing recommendations that were accurate, strategic, and specific to this client's actual situation.

We walked into that meeting looking like we had spent hours preparing. But really? We had done the heavy lifting weeks ago—we just didn't realize it would save us in this particular moment.

Here's the Thing Nobody Tells You About AI

AI isn't magic. It's an amplifier.

If you've got garbage inputs – vague prompts, no context, no foundational knowledge – you're going to get garbage outputs. Fast garbage is still garbage.

But if your team has done the homework? If you've built the foundation together? Then AI becomes your secret weapon for those moments when life gets lifey, and you need to look like rock stars in five minutes.

The difference isn't the AI. The difference is the work we did *before* we needed the AI.

The Foundation That Makes AI Actually Useful

Here's what we had in place that saved our collective butts (and made us look good doing it):

1. Client ICP Documentation

We're not talking about a vague "our target customer is small businesses." We build detailed profiles that include:

- Specific pain points and the language used to describe their customers
- How their customers make decisions (motivations, trends)
- Demographic, technographic, and other information about their customers

When you feed AI specific, accurate information about who you are trying to reach, you get specific, accurate suggestions back.

2. Knowledge Blocks About Their Industry

We had already compiled knowledge blocks about the company, who they service, and what their product offerings are. This context meant the AI wasn't generating generic marketing advice – it was generating advice tailored to the actual environment this client operates in.

3. Good Governance and Data Hygiene

This is the unsexy part nobody wants to talk about. But if your client information is scattered across seventeen different documents or outdated? You're not going to be able to leverage AI effectively when you're in a time crunch.

We keep client information centralized, regularly updated, and easy to reference quickly. It's not one person's job – it's how we all work.

4. Prompting Skills We've Actually Developed

This isn't about knowing some secret prompt formula. It's about understanding how to give context efficiently, what specific outputs we need, and how to structure requests for clarity.

[I talked about this in last week's newsletter.](#)

We didn't develop these skills overnight. We developed them by using AI regularly as a team, not just in emergencies.

Why "Accurate" Matters More Than "Fast"

Here's where people get AI wrong: they think the win is speed.

Speed is great. But accuracy is what keeps clients.

When we walked into that meeting with AI-generated recommendations, they worked because they were built on accurate foundational information we'd compiled together. The client didn't know (or care) that we'd pulled this together in four minutes. They cared that the suggestions were:

- Relevant to their specific situation
- Aligned with their goals and constraints
- Grounded in real understanding of their market
- Actionable with their actual resources

If we'd just thrown a generic prompt at AI without that foundation, we might have gotten something fast. But it would have been obvious we were winging it. The suggestions would have been too vague, too generic, or just plain wrong for their situation.

What This Means For Your Team

AI can't save you if your team hasn't done the homework. It can't generate accurate, relevant insights from thin air. It can't replace strategic thinking or deep client knowledge.

But if your team *has* done that homework? If you've built those knowledge blocks and developed those skills together? Then yes, AI can absolutely save your collective butts when life gets busy and you need to walk in looking like you own the place.

The next time your team gets that "Meeting in 5 minutes!" notification and realizes you forgot to prepare, you'll either be scrambling to reschedule or walking in together looking like pros.

The difference is the foundation you build together, today.

How are you securing your foundation? Reply to this email or join the conversation in our

free Slack community, [Analytics for Marketers!](#)

- Katie Robbert, CEO

November 26, 2025: What are you grateful for this year?

There are a lot of things to be worried about right now - budgets, politics, climate, etc., etc. - you know all the things. Which means it's a good time to step back and reflect on what you're grateful for. It's U.S. Thanksgiving this week, so I asked our Slack Community, Analytics for Marketers, what they are grateful for. It's a great reminder that not everything is terrible.

Here is a sample of what they said:

- Katie:
 - my little family
 - my cozy home
 - built a company that allows for good work/life balance
 - coffee
- Christopher:
 - me and my loved ones' continued good health
- Hannah:
 - a family I love and that loves me back (In-laws included!)
- Todd:
 - to make it through the year!
 - that the bar I went to on Fridays reopened (as a BBQ restaurant) so I have an excuse to leave the house and meet up with friends, who keep me sane(-ish)
 - wonderful online communities like Analytics for Marketers, Measure Chat, SmarterX, and others
- Kelsey:
 - finally work for a company that cares about the employees
 - still have a job in this insane economy
 - friends who carry the ability to show our love for one another and who continue to love me all these years later
 - Taco Bell
- Joy:
 - my person
 - our fluffy kitty
 - our home
 - family and friends
 - the clients I have keeping us afloat
 - this group and our silliness and brainpower!
- Kaye:
 - my family and friends
- Jim:
 - got added to the ChatGPT Enterprise pilot program at work and encouraged to mess around with it

- Lisa:
 - the giant family I found through a DNA test
 - have broken the generational stuff on my mother's side
 - My adult kids actually like my company
 - my husband of 26 years and his equally giant family
 - an incredible community
- Anthony:
 - this "virtual" community who shares more, helps more, and checks in more than almost all of my IRL groups, friends, and "community"
- Sunny:
 - a strong community of friends
 - healthy family
 - a squad of incredible women who speak my name in rooms when I'm not there
- John:
 - things are ok in all three circles: health, family, work
- Tris:
 - still here kicking around
 - getting healthier (down nearly 20 lbs since July)
 - my family is healthy
 - all you in this community for giving me a place to be as geeky as I truly am
- Leslie:
 - Almost being finished with my PhD
 - Podcast is super fun to record and has more listers each month
 - Having a great doggo who loves all dogs and people
 - Having such a big friend group that shares my science-first airborne illness aware protocols so we can keep hanging out
- Margie:
 - I can buy food though the prices are high
 - I have graduated from pickle plate girl to side dish cooker for Thanksgiving
 - this community - everybody is amazing
 - you and that Chris guy. You've taught me so much this year!

What are you grateful for this year? Reply to this email or join the conversation in our free Slack community, [Analytics for Marketers!](#)

- Katie Robbert, CEO

December 03, 2025: Frameworks Aren't Buzzwords; They're Your Sanity Check

I get a good chuckle out of the running joke that “Katie has a framework for that.” Honestly, it’s usually true. If it’s a big, messy problem that involves data, people, and technology, chances are, we’ve broken it down into a repeatable sequence of letters.

Lately, it feels like “framework” has become the hottest buzzword in marketing, right up there with “Generative AI” and “hyper-personalized customer journey.” Everyone has one. There’s the one that promises to fix your content, the one to optimize your sales funnel, and the one that will make you breakfast (okay, maybe not that last one yet, but I’m sure Chris is tinkering with it).

So, are frameworks just another example of corporate jargon we need to ignore? I don’t think so. I’m here to argue that they aren’t buzzwords; they are the essential infrastructure for handling the overwhelming complexity of modern business. You need them because, frankly, **they turn complexity into consistency.**

The Problem: We’re Drowning in Data and Possibilities

Think about what we’re being asked to manage today. It’s not just a website and an email list anymore. You’re juggling GA4 migrations, multi-channel attribution, ethical AI governance, social media platforms that change algorithms monthly, and the constant pressure to prove ROI to leadership.

It feels like trying to cook a gourmet, seven-course meal without a single recipe or standard operating procedure (SOP). You have all the ingredients (data!), all the fancy equipment (tech stack!), but without a plan, you’re guaranteed to end up with chaos, burnout, and a dish that doesn’t look, taste, or perform the same way twice.

We all want agility—the ability to pivot quickly when the market shifts. But agility isn’t chaos. Agility is the ability to move quickly because you have a strong, reliable foundation built on repeatable processes. That’s exactly what a good framework provides.

Why Consistency Is Your Competitive Advantage

When you look at companies that thrive, especially during periods of massive disruption like the one we’re in now with AI, their secret isn’t a silver bullet technology. Their secret is consistency.

A framework is essentially a standardized recipe for strategic thinking. It ensures that regardless of who is tackling the problem—whether it’s your leadership team, operations, or a new intern you just onboarded—they follow the same logical steps, ask the same

critical questions, and arrive at a result that is measurable and repeatable.

I used to work in organizations where every new project started from scratch. We'd waste weeks trying to define the scope, only to realize halfway through that we were using the wrong metrics or hadn't gotten buy-in from a key stakeholder. Why? Because we didn't have a shared, repeatable **process**.

That's the beauty of standardization. It reduces the cognitive load of having to constantly reinvent your approach, freeing up your valuable human time for the creative, empathetic, and strategic work that truly drives value.

The 5P Framework: A Guide Out of the Weeds

When I set out to build a framework at Trust Insights, I wanted something that forced us to look at a project holistically, not just through the lens of technology. That's how the **5P Framework** was born: **Purpose, People, Process, Platform, and Performance**.

I saw too many "digital transformations" fail because they bought the technology (Platform) first, then tried to cram their staff (People) into rigid new workflows (Process) without ever defining the measurable goals (Performance) or, most critically, the *Why* (Purpose).

Here's how the framework forces clarity:

1. **Purpose:** What's the problem we're *actually* solving? Not, "We should use AI." But, "We need to reduce the time spent on manual reporting by 50% to free up our analysts for predictive modeling." Clarity on your Purpose is everything.
2. **People:** Who's involved? Who needs to be trained? Who's going to resist the change? If you don't address the human element and change management upfront, your project is doomed.
3. **Process:** How do we do it today, and how should we do it tomorrow? We need SOPs, clear workflows, and governance. You can't automate a messy process; you'll just automate the mess.
4. **Platform:** Now you choose the tool. Once you know the Purpose, People, and Process requirements, choosing the right platform becomes easy. It's the last choice, not the first.
5. **Performance:** How do we know we succeeded? Did we hit the goal set in the Purpose? This loop ensures every investment is tied to a measurable business outcome.

I remember once trying to roll out a new project management tool in a past life. Everyone hated it. Why? Because we focused entirely on the *Platform's* features—it had Gantt charts and beautiful dashboards!—but we skipped the **People** and **Process**. It was a total flop that wasted time, money, and demoralized the team. If we had used the 5Ps, we would have recognized that the team needed a cultural shift toward transparency, not a new piece of software.

Applying Frameworks to Generative AI

The ultimate complex topic today is Generative AI. It's moving so fast, it can feel impossible to pin down a strategy. This is where frameworks move from helpful to mandatory.

When clients come to us overwhelmed by AI, we immediately put their challenges through a prioritization system like our **TRIPS Framework (Time, Repetition, Importance, Pain, Sufficient Data)**.

This helps us narrow down the infinite list of possible AI use cases to the one *Quick Win* that has the biggest impact and the highest chance of success.

For instance, let's say a task scores high on **Repetition** (it happens every day) and **Pain** (the team hates it). That's a perfect candidate for AI automation because solving that problem delivers instant efficiency *and* boosts team morale.

But we don't stop there. Before we press go, we use the 5Ps to check readiness and the 6Cs to check the quality of the **Sufficient Data**. This combination ensures that the project we choose isn't just a fun experiment; it's a strategically sound investment.

Frameworks as Culture Carriers

Ultimately, frameworks are a communication tool. They're what we use to make sure our actions align with our mission.

When we are transparent and honest, we are clear on our Purpose.

When we are committed and smart, we are rigorous with our Process.

When we are clear and direct, we communicate our Performance metrics.

Frameworks are the guardrails on the racetrack. They don't stop you from driving fast and pushing the limits of innovation; they just make sure that when you do, you stay on the track and don't end up in a ditch. They empower your people to experiment safely because they know the boundaries and the agreed-upon steps for measuring risk.

If you don't have a repeatable framework, you don't have a strategy—you have a sequence of lucky guesses. And while luck can get you a few quick wins, it won't sustain a high-performance organization.

So, the next time someone laughs at my love for frameworks, I'm okay with it. They can call it a buzzword. I call it the blueprint for business sanity and the key to turning abstract ideas into quantifiable success.

What are your go-to frameworks? Reply to this email or join the conversation in our free Slack community, [Analytics for Marketers!](#)

- Katie Robbert, CEO

December 10, 2025: Why Everyone Hates the CEO

I recently spent some time reading through a compilation of anonymous employee feedback from Reddit regarding CEOs at large, global companies. It was... a lot.

Some of the chief complaints that kept surfacing included:

- **Financial Mismanagement & Greed:** Sacrificing long-term growth and stability for short-term profits or personal bonuses.
- **Reactionary, Chaotic Decision-Making:** Treating every fleeting whim as a top priority, creating organizational whiplash.
- **Unclear Direction & Lack of Structure:** Leaving teams adrift without clear goals, metrics, or instructions.
- **Undermining Authority:** Bypassing established leadership structures based on gossip or favoritism.
- **Micromanagement & Lack of Trust:** Hovering over details and refusing to delegate, signaling deep insecurity.
- **Incompetence & Politics:** Promoting based on charisma rather than skill, while fearing reality and reason.
- **Tone-Deafness & Disconnection:** Ignoring company policies for favorites and failing to understand the operational reality of the workforce.
- **Imbalance of Workload & Compensation:** Demanding unrealistic output without providing necessary resources or fair rewards.

Reading through these, my first reaction wasn't defensiveness. It was recognition.

I get it.

If you've ever worked in a large organization, you've likely felt the frustration of a leadership team that seems disconnected from reality. You've watched a CEO chase a shiny new object while the core business crumbles. You've dealt with the "executive priority" of the day that derails weeks of actual work. You aren't alone, and your frustration is valid.

But here's the unpopular opinion: while it's easy to write these leaders off as "bad people" or "ego-driven," (and this is definitely true for a lot of them) the reality is that the CEO-employee relationship is a two-way street. Yes, the power dynamic is skewed, but silence and resentment from the workforce only fuel the chaos.

So, let's break down these toxic dynamics and look at what **CEOs need to stop doing**, and proactively, **what employees can do** to survive—and maybe even fix—the chaos.

The Strategy Gap: "Everything is a Priority"

One of the loudest complaints is that executive decisions lack coherent strategy. Employees feel like they are constantly pivoting to chase short-term gains or the CEO's

latest whim, introducing chaos and financial stress.

For the CEO: Stop Being a Chaos Agent

Your job isn't to have every idea; your job is to kill the bad ones. When you chase every shiny object (hello, Generative AI), you aren't being innovative; you're being distracting. You need to define a clear Purpose—the "North Star"—and stick to it. If you change the strategy every quarter, you aren't pivoting; you're flailing. Before you announce a "new direction," ask yourself: Does this align with the core problem we solve? If not, shelf it.

For the Employee: Force the Trade-Off

When leadership throws a new "P1" priority on your plate without taking anything off, don't just say "okay" and burn yourself out trying to do it all. You have to manage up.

Respond with data, not emotion. Say this: *"I can absolutely focus on this new initiative. Currently, I have Projects A, B, and C on my plate. To accommodate this new priority, which of these three should I pause?"*

Force leadership to acknowledge the trade-off. Often, they don't realize the capacity constraints until you show them the math.

The Trust Void: Micromanagement vs. Accountability

Another recurring theme is the toxic dynamic of micromanagement. Employees see leaders who gained their positions through charisma but lack the competence to actually do the job. This insecurity breeds a need to control every minor detail.

For the CEO: Delegate Outcomes, Not Tasks

If you are checking font sizes or rewriting email copy, you are failing as a CEO. You are paid to think strategically, not tactically. Micromanagement is a symptom of your own insecurity—you don't trust the process, so you hover over the people.

Stop it.

Instead, set clear expectations for the **outcome** (the "what") and let your team figure out the **process** (the "how"). If you can't trust them to do that, you either hired the wrong people or, more likely, you failed to give them clear instructions.

For the Employee: Over-Communicate to Buy Freedom

If you are being micromanaged, it's usually because your boss is anxious about what you're doing. The antidote to anxiety is information.

Be proactive. Don't wait for them to ask "where is this project?" Send a status update *before* they ask. Document your process. Show your work. When you make your workflow transparent, you remove the mystery. When you remove the mystery, you remove the need

for them to hover. You buy your own freedom by flooding the zone with clarity.

The Reality Disconnect: “Do More With Less”

Finally, there is the heartbreaking complaint of tone-deafness. Executives who push teams to do more with less, ignore their own policies for “favorites,” and fail to support the workforce during transitions.

For the CEO: Walk the Walk

You cannot mandate “return to office” while you work from your vacation home. You cannot cut budgets for tools while flying private. Culture isn’t what you put on a poster; it’s what you tolerate and how you behave.

If you are asking the team to “do more with less,” you need to be in the trenches removing obstacles, not adding to them. You need to acknowledge the burnout, not gaslight your team into thinking they just aren’t working hard enough.

For the Employee: Set Boundaries Based on Data

When the workload becomes unrealistic, “trying harder” is a trap. You need to treat your time like a budget.

Track your time. When the request comes to “do more,” show the receipts. *“Here is a breakdown of my 40 hours this week: 15 hours went to meetings, 10 to administrative tasks, and 15 to deep work. Where can we cut?”*

It’s hard to argue with a timesheet. By protecting your boundaries with data, you aren’t being “difficult”; you’re being professional.

The Bottom Line

The complaints about CEOs usually boil down to a lack of strategy, understanding of how we work, and trust and respect.

CEOs: You need to stop treating your employees like cogs in a machine and start treating them like the engine that drives the business. Get clear, get organized, and get out of their way.

Employees: You can’t control who sits in the corner office, but you can control how you engage with them. Stop waiting for permission to organize your work, set boundaries, and demand clarity.

It’s a relationship. And like any relationship, it only works if both sides show up, communicate clearly, and respect the other person’s reality.

You can do this.

How are you managing expectations? Reply to this email or join the conversation in our free Slack community, [Analytics for Marketers!](#)

- Katie Robbert, CEO